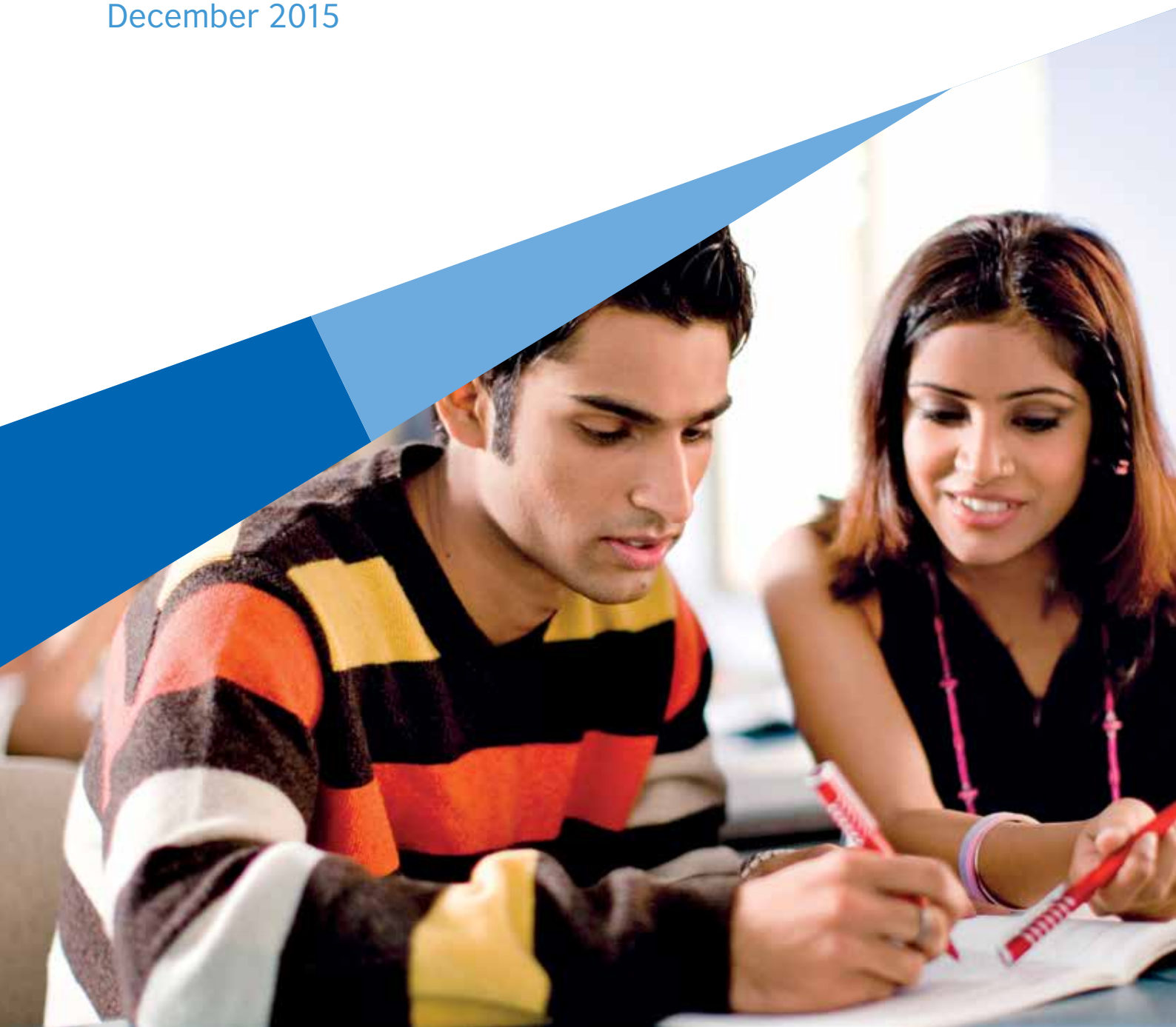


TRANSNATIONAL EDUCATION

A GUIDE FOR CREATING PARTNERSHIPS IN INDIA


December 2015





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Foreword

Prime Ministers Narendra Modi and David Cameron announced 2016 would be the ‘UK-India year of Education Research and Innovation.’

The demand for higher education in India continues to outgrow the current traditional capacity, so new methods of delivery, assessment and recognition are going to be an essential element of the future landscape. India has the largest university age cohort in the world, and when combined with India’s economy – growing at an average of 8% over the last decade, will result in an urgent demand for innovation in education and training delivery – including transnational delivery.

During his recent visit to the UK, both prime ministers Narendra Modi and David Cameron announced 2016 would be the ‘UK-India year of Education, Research and Innovation.’ This year-long campaign will highlight the strength and mutual benefits

of the bilateral relationship, both to draw together and increase impact of current programmes and to drive further collaboration, including across a range of digital technology-enabled education and training initiatives.

This report on transnational education covers three main areas: It provides a current overview of the UK-India transnational partnerships. It provides clarity on the regulatory and legal framework under the new Indian government, and it provides a practical guide for establishing new transnational partnerships with India.

I hope you find it both an informative and practical publication, which supports your future institutional engagement with India.



A handwritten signature in black ink that reads "Rob Lynes".

Rob Lynes
Director, British Council India

Executive Summary

India presents an opportunity for transnational (TNE) partnerships for UK universities given the projected demand for higher education in India. Enrolments have risen steadily over the last 5 years on TNE programmes to approximately 13,000 students (2013/14) and those articulating into the UK on TNE programmes contribute up to a fifth of all Indian undergraduate students in UK. Private universities in metro cities are most likely to partner on TNE programmes and these partnerships are a useful mechanism for UK universities to extend their networks and brand recognition in India. However, while degrees delivered by TNE are allowed, the regulatory conditions mean that qualification recognition remains a challenge. India also remains a price sensitive market.

1. Key findings

Enrolments to UK-India TNE programmes have grown steadily over the last five years to 12,920 (2013-14), although a small number of UK universities dominate enrolments. The majority of enrolments were in management and technology related topics. Transfers to the UK through articulation arrangements, account for up to a fifth of new Indian undergraduate enrolments. (430 in 2013/14)

Indian TNE partners identified in the report were all private providers who operate in a very competitive and price sensitive market. Students are seeking high value added in terms of enhanced employment opportunity. The rupee student fees for Indian partner institutions were

in the range £1,200 to £3,000 pa – the UK university fee was in addition to this and averaged £600 pa for undergraduates and £1,000 pa for postgraduates.

It was noticeable that TNE partnerships were more likely to be located in the more wealthy metropolitan areas (Delhi and Mumbai especially).

2. Benefits

Successful partnerships had given rise to many direct benefits. For students: different study experiences and learner support. For Indian partners and staff: Quick start-up of programmes, international training for staff and tighter approaches to quality assurance. For UK universities: New understanding and networks with India, increased staff and student exchanges with greater potential student mobility to UK.

Many of the India-UK TNE partnerships were underpinned by strong staff relationships - teams with a shared outlook and understanding. Investment in team-building was identified as crucial.

3. Regulation

The University Grants Commission (UGC) and All India Council of Technical Education (AICTE) changes to TNE requirements are supportive and allow foreign degrees to be delivered through TNE partnership arrangements. There is an associated need for parallel affiliation of any programme with an Indian university for a degree award. A

further requirement is that all Indian education activities must be not-for-profit.

There remain some challenges regarding the recognition of foreign degrees, particularly for distance learning, but the recent Association of Indian Universities (AIU) requirements offer some flexibility in defining equivalences of awards.

4. Opportunities

The potential for new TNE partnerships grows. The very high demand for higher education across the country, the facilitative approaches of government organisations, interest in greater internationalisation of Indian education, all contribute to a positive outlook.

5. Challenges

Price-sensitivity and the relatively low fee levels for degree programmes in India are a challenge for foreign universities, with their higher cost base. Programmes with economies of scale are one option and transfer programmes to UK campuses also offer potential for revenue to match costs.

Cultural differences need to be recognised and addressed, these could be at both institutional and individual levels and include: Learning cultures: encouragement of critical thinking amongst students, new approaches to assessment, programme development and teaching. Institutional cultures: disparities in management,

administrative structures and delegations. TNE Indian partners are private whereas UK partners are public, can all give rise to misunderstandings. Regulatory and quality cultures: these could be both conceptual and system specific and required two-way attitudinal and organisational change to address.

6. Operational considerations

Student support was found to be often patchy, with the best examples being where students in India had similar access to learner support as their counterparts on the UK campus.

Joint planning and progress monitoring were identified as mutually beneficial although not uniformly evident. This included for better sharing of information, assessing and managing risk and routine review of targets and business plans.

There are excellent examples of staff development, including with staff enrolled on postgraduate and doctoral level programmes, but this was not widespread. Indian partners were sometimes reluctant to invest, concerned that their investment would be lost through poaching of trained staff by competitors.

UK universities are currently only marginally involved in marketing their TNE programmes in India. Profiling their brand, promoting the quality of programmes and student experience, should encourage more Indian students to enrol.

Programme closure: teach-out on programme closure was seen as giving rise to difficulties. The need for this provision is critical at the initial planning and contracting stage of new TNE partnerships.

Glossary

AICTE

All India Council for Technical Education

AIU

Association of Indian Universities

DAP

Degree Awarding Powers

DL

Distance Learning

FMS

Faculty of Management Studies

GOI

Government of India

HEI

Higher Education Institutions

IGNOU

Indira Gandhi National Open University

IIM

Indian Institute of Management

IIT

Indian Institute of Technology

JNU

Jawaharlal Nehru University

MHRD

Ministry of Human Resource Development

MOOC

Massive Open Online Courses

NAAC

National Accreditation and Assessment Council

NBA

National Board of Accreditation

NOC

No Objection Certificate

NTU

Nottingham Trent University

OBU

Oxford Brookes University

OPT

Optional Practical Training

QA

Quality Assurance

QAA

Quality Assurance Agency

TNE

Transnational Education

UGC

University Grants Commission

VLE

Virtual Learning Environment

Section 1: Introduction and definition of terms

The research was carried out in UK and India in autumn 2015 by a consortium led by Neil Kemp in UK and Joy Joyti Nandi in India, with Sudhanshu Bhushan (National University of Educational Planning and Administration), Vijay Vrat Arya (University of Delhi) and Rajani Naidoo (University of Bath).

A total of 56 Indian institutions were contacted, and detailed follow up was undertaken with 42 of these. Over 150 programmes were identified as involving some form of TNE partnership.

To introduce TNE delivery in India we consider two overarching approaches: distance learning and collaborative provision.

The former, only considers those programmes where there is no support provided in India, fully on-line

or delivered through various types of unsupported distance learning.

For collaborative provision the QAA defines as¹ 'Collaborative provision denotes educational provision leading to an award (or to specific credit toward an award) of an awarding institution delivered and/or supported and/or assessed through an arrangement with a partner organisation' These might fall under the following delivery arrangements:

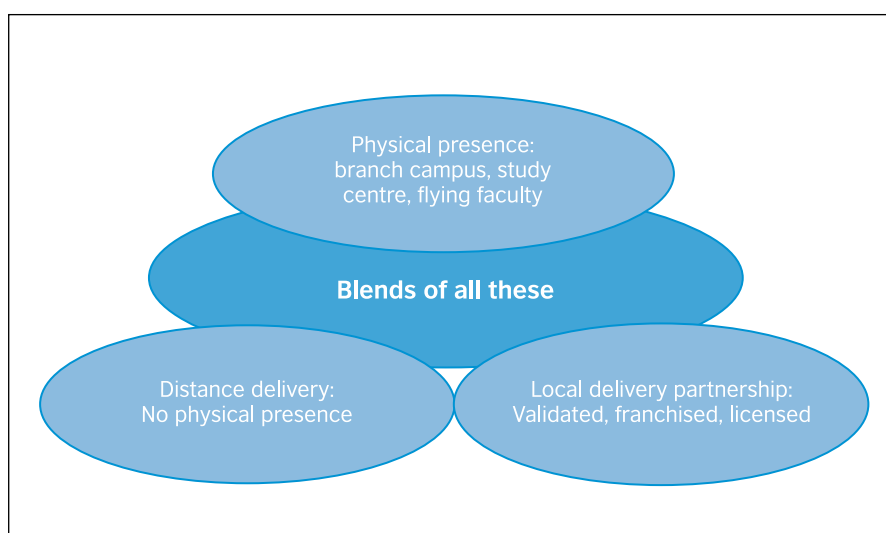
- programmes studied entirely in India for example through validation, franchised and/or licensed type arrangements (in country)
- programmes studied partially in India and partially in the UK (twinning)
- programmes studied in India that lead to a qualification from the

Indian partner, giving entry with advanced standing to a programme offered by the UK institution with an award from that institution (articulation)

- distance learning programmes, offered by the UK institution with in-India support from the Indian partner or from the UK institution, through visiting faculty. (supported distance learning)

Most TNE programmes involve various mixes of the above modes, the result being 'blended learning'. The modes and overlaps are described at length in 'The Value of Transnational Education to the UK'². Figure 1.1 below illustrates the mixes of delivery arrangements possible and how they might overlap. Individual programmes typically involve various mixes of these modes as institutions and develop appropriate 'blended' approaches to relate to student needs, institutional resources and capabilities.

Figure 1.1: Illustration of overlapping delivery modes and resultant blended learning



1 Code of practice for the assurance of academic quality and standards in higher education'; Section 2: Collaborative provision and flexible and distributed learning (including e-learning), QAA 2004.
 2 'The value of Transnational Education to the UK'; BIS Research Paper Number 194 (November 2014).

Section 2: The TNE landscape in India: Demand, partnership and delivery

- There is a growing demand for HE in India, driven by large increases in secondary school enrolments which is not met by current provision.
- Alongside, there has been steady growth in UK TNE enrolments in India, with a relatively small number of UK universities dominating.
- Foreign TNE partnerships in India are dominated by UK and US universities.
- UK immigration changes have negatively impacted on transfer arrangements.
- Demand for UK postgraduate distance learning programmes grows steadily.
- Business and management account for nearly two-thirds of TNE programmes.
- Indian students are very active users of MOOCs and prioritising advanced and technical programmes.

This section presents an analysis of the TNE market in India, in the context of higher education trends, and also the wider international operating environment. It also assesses demand for UK TNE programmes and the variety of partnership modes in evidence.

2.1 UK, India and TNE delivery

In terms of total global enrolments, according to lead countries of delivery for UK TNE programmes, India ranks fourteenth with some 12,920 students recorded in the UK Higher Education Statistics Agency Aggregate Offshore Record (HESA AOR)³ for 2013-14 (see Table A1). The India total has been increasing steadily over the last five years and reference to Table 2.1 (next page) indicates that the largest numbers of students in India follow undergraduate partnership programmes (8,815 enrolments). However the data in Table 2.1 do require some explanation, as a few universities dominate:

- Oxford Brookes University (OBU) has 3,360 undergraduate students enrolled on Indian partnership programmes. Many of these are part of the partnership with ACCA whereby students enrolling for ACCA programmes are also registered for an OBU degree⁴;
- University of London International has 715 registered students in India, following undergraduate programmes (NB reported in the AOR as distance learning)⁵;
- Master degrees delivered through some form of partnership arrangement are dominated by Coventry University and the University of Lancaster (see Table A3).
- Nottingham Trent University enrolments prior to 2013-14 were not included in the AOR. For 2013-14, enrolments to their India TNE programmes were 2,210.

A more detailed analysis of UK universities offering programmes in India, according to mode and level,

also derived from the AOR, is provided in Tables A2, A3, A4 and A5 in Annex A.

Table 2.1 (see next page) indicates steady growth trends for all delivery modes. It is, however, important to consider in turn the implications associated with each delivery mode.

2.2 TNE Partnerships

Delivery through partnership arrangements dominates UK TNE programmes in India and account for approximately 80% of all enrolments. Tables A2 and A3 indicate enrolments to partnership programmes and these indicate that more students are enrolled on undergraduate compared with postgraduate programmes. At the undergraduate level OBU and NTU, accounted for 64% of enrolments, with a further eight universities each reporting over 150 enrolments in India.

However, for postgraduates just three universities, Coventry, Lancaster and Cardiff Metropolitan account for 84%

Table 2.1: Enrolments to UK university degree programmes delivered in India according to mode and levels of study

	2010-11	2011-12	2012-13	2013-14
Bachelor degrees				
Delivery through collaborative provision	5,595	6,300	6,400	8,815
Distance learning	540	565	745	830
Master degrees				
Delivery through some form of partnership	1,420	2,185	1,765	1,860
Distance learning	760	755	1,145	1,180
Doctorate degree				
Delivery through some form of partnership		20	30	15
Distance learning	15	20	38	45
Total (all modes/levels)	8,340	9,845	10,125	12,920

Source: HESA AOR (Accessed October 2015)

of TNE enrolments; others have only small numbers.

2.3 Distance learning

Enrolments to distance learning programmes have increased steadily and at both undergraduate and postgraduate levels, mirroring the UK's global experience. However at the undergraduate level University of London International dominates (see Table A5) accounting for nearly 90% of DL students - note that many students are enrolled on some form of supported programme, for example with Russell Square International College⁶.

There is a wider spread of UK universities involved in provision of distance learning postgraduate programmes and most have grown enrolments, albeit modestly.

Anecdotally, the dominant programmes, in terms of demand, would seem to be for MBAs, based on the mix of UK universities involved (see Table A4).

2.4 Transfers for study to the UK

There has been a modest flow of Indian students, particularly at undergraduate level, transferring to a UK university campus to commence in year 2, 3 or 4 of a degree course, after following the initial year(s) through some form of twinning or articulation programme. Most of these latter programmes are delivered in India by a local partner; although some foundation and initial year programmes could have involved UK private providers either in India or the UK. A more detailed analysis of articulation arrangements and their

impact can be found in studies by Ilieva⁷ and CRAC⁸.

Transfers from India to the UK peaked in 2010 at nearly 800 undergraduates and, since then, have fallen back to 430 in 2013-14 (see Table A6). Master degree enrolments for articulation have declined sharply and again numbers peaked in 2010 at 595 enrolments, although declines to one UK University appears to have been the major factor.

Institutional staff interviewed reported that the decline in the number of transfers was due to the UK immigration restrictions, in place since 2010. Given that many of the programmes were vocationally orientated, the loss of access to post-study work experience and internships has impacted negatively. This downward trend exhibits similar characteristics to those seen for the direct recruitment of Indian students to the UK.

Revenues associated with articulation

The indication, through comparison with HESA data for new undergraduate enrolments for 2013-14 (2,295), is that up to a fifth of Indian enrolments to UK universities from India were through transfer partnership. A very approximate analysis, based on Table A6, suggests that for 2013-14 the total revenue overall to the UK associated with transfers from India approached £14 million. This sum is based on an average UK university fee of £10,000 pa with 'other expenditure' of a similar amount.

2.5 MOOCs and Indian engagement

This is briefly considered as it might offer some indication for TNE (distance learning) demand in the longer term, although there are currently few formal degree programmes offered through a MOOC platform. Indian students are the second largest national group engaged in studying MOOCs – after the US. What is emerging⁹ is that Indians appear to seek the more technical MOOC courses on offer. This contrasts with Europe and North America where the audiences seem to prioritise topics relating to arts and humanities.

Coursera¹⁰ report that eight of their most popular programmes in India are highly technical: the most popular is a University of Maryland course on building mobile applications, with machine learning programmes from Michigan, Rice and Stanford Universities also popular.

Indian institutions have become involved in the development of MOOCs – both Indian and in partnership with large foreign providers. For example IIT Mumbai has teamed with edX to provide courses for training engineering teachers.

Coursera is working on a mobile application aimed at students from disadvantaged backgrounds to enable MOOC access on Indian low-cost Akash tablets. It also offers a course on web intelligence and big data with IIT Delhi.

Udacity has developed a partnership with Georgia Tech and AT&T to offer an online Master degree in computer science¹¹, with many options, for less than US\$7,000 tuition fee. This course is targeted on India and the Middle East, although enrolments are not known.

2.7 Demand for higher education in India

The establishment of new HEIs and their enrolments have grown at an unprecedented rate over the last decade. This has been a period of demand driven expansion for Indian HE systems, as government struggles to respond to the increasing numbers of students exiting upper secondary education and seeking to move into higher education. The private sector has been allowed to expand

to absorb this demand, given public finance constraints and the lack of capacity in the state system. There is every indication that such growth will continue.

Degree level student numbers have more than doubled since 2005, and totalled 31.8 million in 2014¹². An additional 20,000 institutions were reported to have opened over the same period, bringing the total in 2014 to nearly 37,400¹³. Additionally there was also approximately 11,000 'diploma level' institutions offering programmes in such areas as nursing and teacher education, resulting 48,000 post-secondary institutions¹⁴. While there might be some concerns regarding the reliability of these data, taken collectively they indicate a very strong trend.

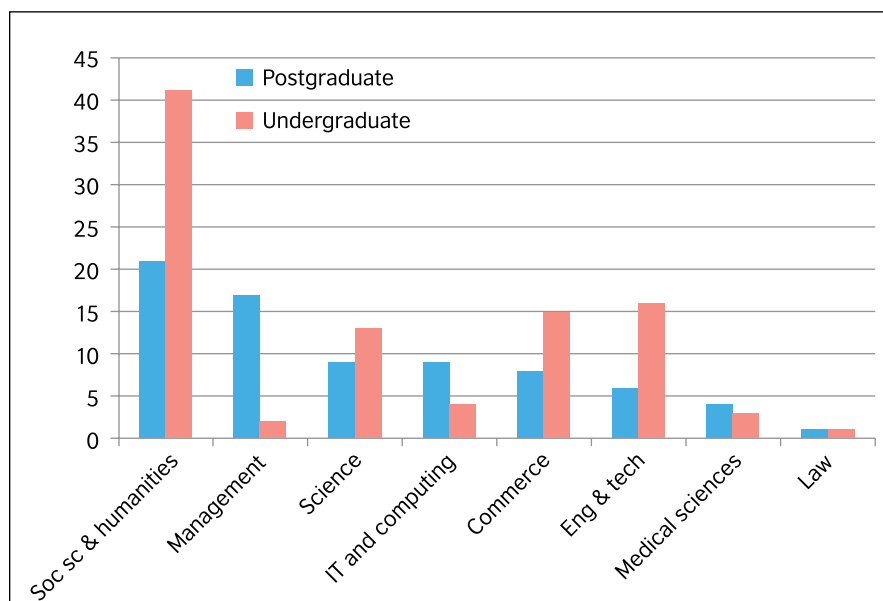
However, in spite of this impressive growth, India's higher education gross enrolment ratio (GER¹⁵) was

estimated to be approximately 23% in 2015, significantly less than some major comparator countries. GOI is keen to increase GER to 30% by 2020, and this at a time when there is also a demographic 'bulge'; the net result will likely be an even greater surge in demand. Meeting these needs will require change at a pace and scale not previously seen, for example implications suggested are the need another 800 universities and 40,000 colleges to accommodate a possible 40 million HE students by 2020. Given public sector finance constraints, the continuing strong growth of private sector provision seems inevitable.

Female enrolment levels have continued to increase over the five years to 2012-13, from 39%, of total enrolments, to 45% (see MHRD, 2015)¹⁶.

Social sciences and humanities remain the most popular subjects at both postgraduate and undergraduate levels (see Figure 2.1) followed by engineering and technology, commerce and science. At postgraduate level the increased proportion of students following management and related topics is clear.

Figure 2.1: Enrolment proportions according to main subject areas across all Indian higher education provision



Source: All India Survey on Higher Education, 2012-13

- 3 Higher Education Statistics Agency (UK): https://www.hesa.ac.uk/index.php?option=com_studrec&task=show_file&mnl=14052&href=coverage.html
- 4 Association of Chartered Certified Accountants and see: <http://business.brookes.ac.uk/about/acca/>
- 5 There are a number of approved partners in India who provide tuition support for University of London International, however all enrolments are classified as 'distance learning' in the HESA AOR;
- 6 <http://www.rsicollege.org/about-us.html>
- 7 Janet Ilieva: 'Directions of Travel - Transnational pathways into English higher education'; HEfCE November 2014/29
- 8 'The value of Transnational Education to the UK'; CRAC Study for BIS: Research Paper Number 194 (November 2014)
- 9 'India loves MOOCs'; MIT Technology Review: <http://www.technologyreview.com/news/539131/india-loves-moocs/>
- 10 <https://www.coursera.org/> & <https://www.coursera.org/learn/python>
- 11 <https://www.udacity.com/georgia-tech>
- 12 Government of India, All India Survey of Higher Education, MHRD Delhi (2015)
- 13 'Educational Statistics at a Glance'; HRD, Government of India, New Delhi (2014)
- 14 GOI, 2015: available on http://mhrd.gov.in/sites/upload_files/mhrd/files/statistics/AISHE13-14P.pdf
- 15 Gross Enrolment Ratio (GER) in higher education in India is calculated as the total enrolment in higher education, regardless of age, expressed as a percentage to the eligible official population (18-23 years) in a given academic year
- 16 Conducted by the Ministry of Human Resource Development. (See MHRD, 2015)

Section 3: The policy and regulatory environment for TNE

- Most TNE partnerships are with Indian private providers.
- AICTE and UGC regulations do allow for establishing foreign TNE partnerships.
- Foreign degree partnerships should also include the award of an Indian degree.
- The new approach of AIU is more facilitative towards recognition of foreign degrees.
- No foreign distance learning degrees are as yet recognised by the AIU.
- There still remain 'grey areas' concerning approval of TNE programmes and the recognition of foreign degrees awarded.
- Recent Government of India policy proposals indicate positive support for foreign delivery partnerships.

This section explores the operating context of the regulatory system in Indian higher education and considers the specific implications that might relate to the delivery of TNE in the country. It explores quality assurance, recognition of awards and related considerations¹⁷.

3.1 The context

The doubling of higher education enrolments to nearly 31.8 million, the addition of 20,000 new institutions to the system in less than a decade, the greater diversity in provision, changing responsibilities for oversight and the fast expansion of private sector institutions have understandably posed major challenges for the regulatory and quality assurance bodies.

The problems and concerns have been clearly recognised, for example recent Commissions (National Knowledge Commission) and Committees (Yashpal Committee) have pointed to regulatory challenges and the need for more self-regulation of universities. All indications are that

changes will occur, as the current approaches are proving to be a problem to manage for – government, the official bodies and the institutions.

The development of international TNE partnerships adds a further complicating dimension. Indian institutions are both involved in partnerships with foreign universities in India, as well as acting as TNE providers themselves in many overseas operations.

3.2 The universities and degree awarding powers

The UGC Act (1956) defines the structure of the university system and stipulates that a degree, as distinguished from a certificate or diploma, can only be awarded by a university, as defined under the Act. It also states that a university can only be established by an act of Parliament or through the Legislature of the relevant Indian State. These stipulations have given rise to a number of types of institutions that have degree awarding powers (DAPs) - note the numbers in brackets refer

to the numbers of each of these six types of institution¹⁸:

- Central University (43): established by a central act of Parliament;
- State University (309) established by an act from the host State Legislature;
- Private University (229) established by an act from the State Legislature (to date none have been under Parliament acts);
- Deemed University (129) or 'Deemed-to-be-University', is a status of autonomy granted under the UGC Act, by central government, on the recommendation of the UGC both for public and private sector HEIs;
- Institutions of national importance (68) – these also have DAPs under the respective acts of Parliament (for example they include the IITs and the National Institutes of Technology);
- Indian Institutes of Management (13) are not defined as

universities, but confer a postgraduate diploma of two years, which has equivalence with a postgraduate degree, and is internationally recognised as MBA equivalent.

3.3 State-Centre relations in higher education

Both Central and State Governments have powers to establish universities, which gives rise to additional complications. These seemingly overlapping authorities derive from the Indian Constitution, which sets out the distribution of powers between Central Government and the States¹⁹; thus each state has authority to introduce its own education legislation. Although any such legislation cannot supersede the legislation made by the Central Government.

As both central and state governments can establish universities, this can create problems; for example, Central Government has not, so far, allowed a private university to be established by an act of Parliament. However, this has not stopped states establishing private universities through their own powers. Additionally the specific requirements for a private university through a state act, might vary from state to state, for example in terms of land, infrastructure, staffing, fees, number of enrolments, governance etc requirements.

The UGC, under their regulations covering private universities stipulates various conditions for the establishment of private universities; no state private university can

supersede the UGC regulations. For example, a private university (unlike a state university) cannot be an affiliating university. It has territorial restrictions, and if it wishes to go beyond the defined state/territory to offer programmes, it must be with the approval of the UGC. Private universities therefore vary somewhat from state to state, in terms of numbers established, variety of programmes offered and quality of instruction.

There are growing regional imbalances between states, for example in the provision of engineering and medical education. Some states have allowed expansion of these institutions through private provision, while others have held back. Similarly fees and admissions' policies fall under the domain of state governments and these vary; central government has not intervened, as yet, in spite of concerns over what is seen to be the hidden commercialisation of higher education.

Given the overlapping roles of State and Central Government, it is no surprise that higher education has frequently been used as a political football between rival parties when political advantage is sought. The meanderings of the Foreign Education Institutions Act through the legislature over the last 10 years is an example of these tensions.

3.4 Private higher education provision

Given the increasingly dominant role of private sector providers, and that most TNE programmes are with private providers, it is important to

understand the nature of private provision in India. The definition of 'Private' might best be considered in relation to institutional management and funding, under which three overarching models are apparent:

- i. Privately managed and privately funded universities and colleges. These are private institutions.
- ii. Privately managed and government funded (partly or fully) universities and colleges. Though they are private by means of management they are largely government funded and controlled.
- iii. Other institutions are government managed and government funded colleges and universities.

Figure 3.1 indicates the proportion of institutions and enrolments according to each of the above three categories²⁰. It is clear that for both total institutions and enrolments, the private sector is the majority provider, however in terms of enrolments per institution publicly funded institutions, on average, accommodate larger numbers of students. The lower average enrolments in private institutions is a manifestation of the large number of small private colleges; although there are some that deliver programmes through multiple centres and enrol tens of thousands of students.

A further consideration is that private providers that offer degree programmes, will normally be a private university (with own DAPs) or a private college (affiliated to a state university for degree awarding purposes).

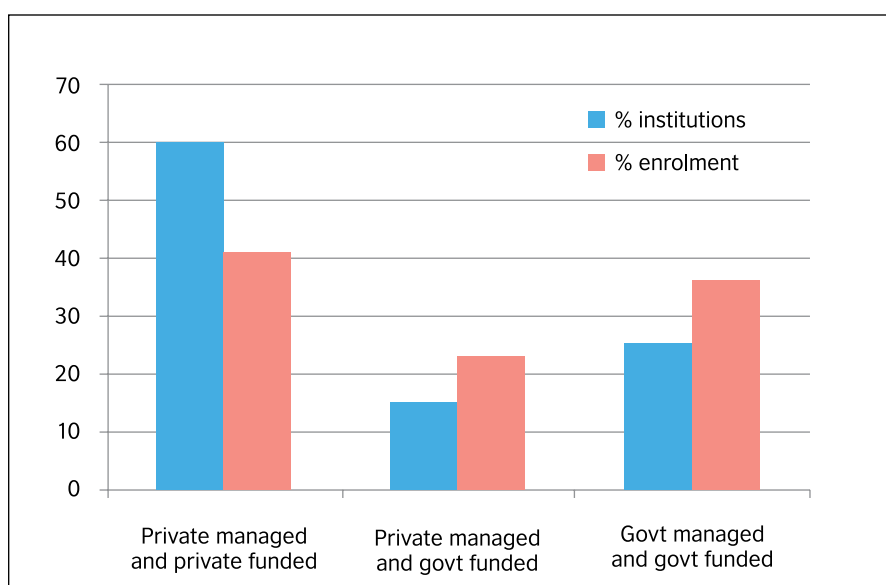
There is considerable variation between states in the number of private institutions as a proportion of all institutions in the state. The all-India average (see Figure 3.1) is 60%, yet for Andhra Pradesh, Tamil Nadu and Telengana it is over 75%, while for some others, including Delhi, West Bengal, Assam and Odisha it is below 40%. These growing disparities between Indian states were commented upon in ‘Managing Large Systems’²¹:

‘Even though privatisation has greatly boosted access system-wide, these gains are not shared equally among states. States with residents of lower income and lower educational attainment focus on funding primary education. For instance, gross enrolment in higher education is at 38.2% in Tamil Nadu while only 8.2% in Jharkhand. While private options have expanded access to higher education and have addressed concerns about employability, they exist mainly in the economically stronger south.’

3.5 Affiliated colleges

An important aspect of the Indian university system is that almost all state universities act as ‘affiliating universities’. This means that they affiliate HE institutions, both public and private, charge a fee for their services, and the students of these institutions sit for exams and are awarded their degree by the affiliating university. Most affiliated colleges offer three-year undergraduate programmes with

Figure 3.1: Proportion of institutions and enrolments under each category of institutional ownership and financing



Source: All India Survey on Higher Education (2013-14) (see footnote)

a smaller number also providing postgraduate programmes. There were approximately 37,000 degree colleges identified in 2014 and together they enrolled 25.2 million students, or approximately 80% of the total post-secondary education enrolment.

Affiliated colleges might be established under a number of arrangements: (i) directly managed by their affiliating university, under which they are established, or (ii) under a Trust or (iii) through the Societies Registration Act (1860), under non-profit conditions. The fourth possible mode of establishment is under Section 25c of the Companies Act which allows institutions to be established as non-profit entities for the promotion of arts, culture and education.

Once established they are governed by managing bodies, which could be either private or government managed. The significant point to note is that while such managing bodies may have autonomy to take decisions, they need to conform to requirements according to:

- The Trust, Society, Companies or Limited Liability Partnership Acts;
- Regulations decided under university and state government (at the state level);
- UGC, technical and professional councils and central government (at the central level)

With such autonomy, managing bodies are free to take decisions to collaborate or partner with Indian or foreign institutions. However, among

the requirements are that they cannot partner to generate profit, and all such partnerships must work within UGC requirements and, as necessary, the regulations of professional councils.

3.6 The regulatory system for higher education

The Government of India, through Ministries and regulatory bodies, regulates Indian higher education institutions. The primary responsibility to maintain standards in higher education falls to Central Government; it has vested the responsibility to deliver with the University Grants Commission (UGC) and other technical and professional Councils. However, as was discussed previously, the delivery of higher education across the country is complex, with a large variety of institutions, differing approaches to finance and management and with overlapping roles of Central and State Government.

These complexities have given rise to a large and mixed assortment of legal and other frameworks. To help clarify understanding, the roles and responsibilities of the various organisations involved in India are outlined and discussed below. Table 3.1 below briefly summarises each of these (see next page).

3.6.1 University Grants Commission (UGC)

Established in 1956 under the UGC Act, the UGC is responsible for co-ordination and maintenance of standards of university education. The UGC has developed regulations

to cover standards of teaching, examination and research and their overall role in these matters applies to all institutions, whether public or private, State or Central. The UGC also mandates the duration of study for different levels of qualifications.

Currently the responsibility for distance learning is vested with the UGC while there is discussion on the structure and responsibilities of the Distance Education Council.

The UGC has also introduced a gazetted notification concerning its role in the approval of TNE partnerships that award foreign degrees, except those regulated by the AICTE²². This is generally presented as a facilitative approach, compared with any previous, for it identifies requirements and steps to develop foreign degree delivery partnerships. It also requires that any foreign partner should have high recognition in their home country. The criteria and conditions mention:

' Foreign Institutions which are accredited with the highest grade in their homeland should be allowed to have twinning arrangements with those Indian institutions which are accredited (NAAC) ... not less than B'

In general terms the criteria to be applied would also seem to follow AICTE guidelines for foreign partnerships (discussed below).

3.6.2 National Accreditation and Assessment Council (NAAC)

NAAC was established in 1994 to accredit universities and colleges offering HE qualifications (undergraduate degree and above). The accreditation is of the institution and not for individual programmes; it is voluntary. Accreditation is generally valid for 5 years and grades awarded vary from A to C. As of June 2014, 128 Universities and 2,258 Colleges had been accredited by NAAC.

The process of accreditation is in three stages: a Self-Evaluation Report based on a set format; a visit by an expert committee; NAAC agreement of the grade and certification. Not all universities are accredited by NAAC and some leading universities have not yet put themselves forward for consideration.

3.6.3 All India Council for Technical Education (AICTE)

The Government of India established AICTE in 1987, as a central body with responsibility for the planning, co-ordination, promotion of quality and the maintenance of standards in technical education in the country. The subject areas covered under its 'technical education' remit include engineering and technology, management and business, hotel management and catering, applied arts and crafts, computer applications and management. Its major activities include approving new technical education institutions and also individual programmes. The levels of programme covered include diploma, undergraduate and postgraduate degree levels²³, and approval responsibilities are delivered through eight Regional Committees.

AICTE also has a key role in approving TNE programmes involving foreign institutions and twinning arrangements that lead to the award of a foreign qualification. A review of the TNE partnerships underway in India (and involving all countries) for this study indicates the topics covered mainly fall within the subject areas over which AICTE has responsibility. The formal responsibility vested in AICTE is to:

'Lay down norms and standards for course curriculum, physical and instructional facilities, staff patterns, staff qualifications, quality instructions, assessment and examination'

AICTE must approve the establishment of new institutions, any increases to enrolments on programmes and ensure that the prescribed standards of infrastructure, staffing and information resources are available at the institutions. Before approving an institution an inspection is conducted and is repeated at regular intervals to ensure the institution is maintaining its approval conditions. Approval is for a fixed-period typically of 3 to 5 years. Where approval conditions are deemed not being maintained, AICTE has the power of withdrawing approval for institutions and programmes; thereby having a role as regulator for technical education India.

As an example, AICTE is currently keen to close poor performing (and poor quality) colleges that also might be in locations that do not attract students.

Table 3.1: The main bodies having regulatory and related responsibilities for higher education and awards in India

	Organisation	Summary of responsibilities
Essential	All India Council for Technical Education (AICTE)	Responsible for planning, co-ordination, quality and standards in technical education. Subject areas under its 'technical education' remit include engineering and technology, management and business, hotel management and catering, applied arts and crafts, computer applications and management. It approves new institutions and also individual programmes.
	Association of Indian Universities (AIU)	Acts as the representative body for universities of India; Liaises between universities and Government (Central and State Government); The only body in India recognised to grant equivalence of foreign degrees.
	University Grants Commission (UGC)	All-India co-ordination and maintenance of standards of university education; Currently responsible for distance learning programme approval; Approves those TNE programmes not falling within AICTE or professional council remit.
Supporting	National Accreditation and Assessment Council (NAAC)	An All-India autonomous body (established by the UGC) to assess and accredit institutions of higher education. Arranges periodic assessment and accreditation of institutions or specific academic programmes or projects
	National Board of Accreditation (NBA)	Established by AICTE and responsible for periodic evaluation of technical institutions & programmes; Assurance of quality and relevance of education programmes in professional and technical disciplines.
	Professional Councils	Fourteen Councils exist plus State Councils of Higher Education Responsible for the recognition of courses and the promotion of professional institutions, including for foreign awards.

Source: Various GOI official publications

Essentially it would like to reduce intake capacity and thus regulate the supply of quality engineers. How implementation is envisaged in a system that is also driven by market/student demand and individual state policies, has not been specified.

3.6.4 National Board of Accreditation:

The National Board of Accreditation (NBA) was established as a division within AICTE to undertake the accreditation of programmes being delivered by institutions approved by AICTE. NBA became an autonomous body in January 2010 with the mandate of accrediting programmes offered by technical education institutions in the areas of covered by AICTE.

Essentially NBA accredits individual courses at AICTE approved institutions. While approval by AICTE is mandatory for any institution seeking to offer any course in technical education, accreditation by NBA is voluntary. Accreditation by NBA only takes place after the course has run for two cycles and is typically valid for up to 5 years. Institutions that have their programmes accredited by NBA are considered to be higher quality institutions in terms of their teaching–

learning transactions as well as their research capability. It is noteworthy that several leading institutions, including the Indian Institutes of Technology and the Indian Institutes of Management have not sought accreditation by NBA.

NBA became a full time member of the Washington Accord in June 2014. Under this agreement all undergraduate engineering degree programmes accredited by NBA after June 2014 will be recognised as equivalent among member signatory countries of the Accord. Currently there are only a few such accredited degree programmes in place. However there is concern in that the UK three-year (and accredited) engineering undergraduate degree programmes are not recognised as equivalent by NBA, even though the UK Engineering Council was a founding member of the Washington Accord and is an active participant.

3.6.5 Professional Councils

Professional Councils are responsible for the recognition of courses and promotion of professional institutions. There are fifteen statutory Councils²⁴ and these include: AICTE, Institute

of Engineers, Indian Council for Agricultural Research (ICAR), National Council for Teacher Education (NCTE), Pharmacy Council of India (PCI), for example:

Medical Council of India (MCI): It responsible for recognition of medical qualifications and the granting of accreditation to medical colleges; all medical practitioners in India must be registered with MCI. The MCI has introduced a test for all medical graduates from foreign universities as a requirement before any can be registered as practitioners in India.

Bar Council of India (BCI): It is empowered under the Advocates Act with responsibility to set standards for advocates. All undergraduate law programmes must be approved by the BCI. Currently, all law graduates must also sit an All India Bar Examination before they can be registered to practise. The Bar Council also accredits foreign law qualifications.

3.6.6 Association of Indian Universities (AIU)

The AIU is the lead body for deciding upon the equivalence of qualifications and has recently published new guidelines setting out their approach to foreign degrees recognition²⁵. This would seem to be more facilitative than previously and some of the main points are summarised briefly below:

- Greater consideration will be given to academic duration, rather than calendar years for programmes;
- Acceptance of credit transfers and other exemptions (including those earned in India) that

contribute to the foreign university's degree programme;

- Recognition of degrees awarded in TNE partnerships with Indian universities (subject to certain stipulations);
- Recognition of degrees awarded at international branch campuses of foreign universities, (subject to certain stipulations);
- No recognition for foreign university degrees undertaken through distance learning.

Problems remain with the recognition of foreign degrees in India, both for degrees awarded outside India as well as those delivered locally through TNE partnerships. For example there are instances of programmes involving foreign TNE partnerships that have been approved by AICTE but that the degree awarded to students on completion is not recognised by AIU. For example a Master degree programme of less than two years or any distance learning programmes will not be recognised for equivalence purposes.

There are on-going discussions with AIU regarding the recognition of certain UK programmes, including the one-year Master degree programmes, split doctorates and some distance learning awards.

Note: The main need for such recognition occurs when the degree holder wishes to: obtain employment in the public sector; or requires some form of professional recognition; or wants to follow a higher degree programme at a public institution.

Note that AIU does not consider the equivalence of degrees awarded by foreign universities that relate to professions in India, these fall to the relevant professional councils.

3.7 Distance learning

The regulatory functions with regard to distance education programmes in higher education have been vested with the University Grants Commission. The Distance Education Council, which previously was the regulator of distance education, has been dissolved and all regulatory functions are being undertaken by the UGC. The approval of programmes delivered through distance education is given only to universities established in India and applies for all Central and State Universities, Deemed Universities and Private Institutions. Although there are only limited examples of the latter being involved.

As mentioned, the AIU does not recognise any foreign degrees awarded through distance learning, although it would seem inevitable that the Indian regulatory authorities will need to reappraise this stance on non-recognition given that:

- The wide global availability of these programmes and the demand for them from Indian students;
- The opportunity they offer to provide speedy quality enhancement of the teaching and learning environment in the tens of thousands of new Indian higher education colleges;

- The growth of online content in India – including, for example, the AICTE changes to offer more blended learning options in technical education;
- Indian institutions themselves offering MOOC and DL programmes for global delivery and award of their degrees outside India;
- The recent comments from Indian politicians and their advisers, regarding wider engagement in international education.

3.8 Foreign TNE partnerships

AICTE: Indian and Foreign Partnerships

AICTE has developed requirements to deliver their responsibilities in relation to foreign TNE partnerships and whether an Indian or foreign degree is awarded. These are described in the AICTE webpages entitled: *'Collaboration & Partnerships between Indian and Foreign Universities/ Institutions in the field of Technical Education, Research and Training'*²⁶. In addition attention is also drawn to the more general AICTE approval processes and documentation: *'Approval processes handbook: 2015-16'*.²⁷ The approach required is prescriptive and mandatory before an application can be considered, and includes, for example:

- Space available – overall for the institution (acreage of land is a criterion as is total floor space) and also for certain main functions for example library space, teaching facilities, laboratory space etc. This also varies according to location e.g. urban or rural location;

- Requirement to subscribe to certain specific journals and publications;
- Staff levels and their qualifications;
- Finances, including student fees;
- Size of student intake for a programme.

It is also a requirement for foreign TNE partnerships that, as part of the approval process they submit a 'No Objection Certificate' (NOC) from their Government/Embassy. This is mentioned in the above referenced 'AICTE Approval Process Handbook'. British Council, New Delhi, provides such a certificate to qualifying UK institutions, on their request.

UGC: Indian and Foreign Partnerships

The UGC has also published a notice to explain that, subject to certain conditions, they can agree to any formally constituted Indian college or university²⁸, partnering with a foreign institution to deliver a programme of study leading to a degree award. Through the partnership approach, even if the whole programme is offered in India and with a joint degree or a single degree under the name of foreign university awarded, then UGC conditions would seem to allow. There is not yet any information or evidence on experiences and/or successes of foreign partnerships that have been submitted through this route.

There is a complication however, in that such arrangements might in theory contravene the UGC Act; implying the latter could require an amendment. As the legislation currently stands only specified universities have the power to confer a degree in India and as yet no foreign provider is included within these.

The UGC conditions also refer to twinning arrangements through which part of a degree might be spent in India and part at the foreign university's campus. For the award of a foreign degree under twinning the UGC stipulation is that a minimum of one semester be spent at the foreign campus. It is also a UGC requirement that the in-India programme should also be affiliated by an Indian university, just in case a student is unable to travel to the foreign campus (for example because of visa difficulties).

Similar conditions pertain for AICTE for their approach to approving foreign partnerships and reference is drawn to the AICTE pages covering 'Collaboration and Partnerships between Indian and Foreign Universities and Institutions in the field of technical education, research and training'²⁹.

Non-compliance and sanction

The UGC and AICTE have powers to close down Indian non-compliant programmes. However, while this has happened for a small number of domestic courses, none involving foreign providers have yet been closed. There are web pages on the AICTE website that lists those programmes and providers that are not recognised. 'Non-recognition' essentially means that the graduates of these programmes cannot be employed in the public sector on the basis of their foreign award or seek higher qualifications in an Indian university.

Note that the large majority of students following TNE programmes,

only seek employment in the private sector, thus formal recognition by GOI or its various agencies was not seen as necessarily relevant.

3.9 Overlapping roles and implications for TNE

In spite of the defined roles and responsibilities of the various bodies described above there remains some lack of clarity and grey areas. This confusion is, to some extent understandable, given the multiplicity of regulations from the respective regulatory agencies, their overlaps, the different policies of Central and State Governments and the implications of recent policy pronouncements from these bodies. These also have implications for foreign university partnerships and the awarding of foreign degrees.

Some examples of such overlaps include: engineering colleges are regulated by AICTE for fitness of the institution and the programme to be delivered, however an engineering college must also and separately fulfil teacher recruitment and promotion policies as mandated by the UGC. Medical colleges affiliated to a university are run under the University, regulated by the Medical Council of India and the Ministry of Health and Family Welfare, yet UGC also regulates aspects of quality, teaching and qualifications.

Teacher education institutions: the mushrooming demand for teachers, driven by the rapid expansion of secondary schools, has resulted in exponential growth of teacher education institutions. At the state

level, individual State Governments are willing to grant 'no objection certificates', state universities affiliate the institutions and the National Council of Teacher Education (the apex regulatory body) awards licenses to run programmes. However the speed of expansion has created problems around loss in quality; it is difficult for the UGC to exercise its quality remit once institutions are established – without initial review.

3.10 Policy areas

3.10.1 Reservations

The Government of India has a policy of affirmative action, essentially to provide more places in government education institutions and government related employment for students from disadvantaged social groups³⁰. Places are therefore reserved in institutions for such students and for staff from these groups. This policy is mandated in all government HE institutions (i.e. those that might be fully supported or financially aided). The present reservation of seats for admissions totals 50% for centrally funded institutions, although the proportion of reserved seats does vary from state to state, and according to the population of the priority social groups. In addition to the reserved places, students from these social groups might also receive scholarships to meet the cost of any fees plus a contribution to their living costs.

These policies do not apply to fully private institutions, although some do offer a limited number of scholarships to support socially and/or economically disadvantaged students.

3.10.2 Foreign Educational Institutions Bill (FEI)

There has been much discussion surrounding this Bill and with numerous statements and analysis, since it was first mooted over 10 years ago. The Yashpal Committee, the National Knowledge Commission and the CNR Rao Committee all proposed approaches to encourage select foreign universities to develop campuses in India. In 2010, with Central Government unsure of getting the Bill through the Upper House of Parliament, the HRD Ministry considered other possibilities to facilitate entry of foreign institutions within existing legislative framework. As a result the UGC presented draft regulations on twinning and joint degree programmes for foreign and Indian educational institutions³¹.

3.10.3 Modi government & higher education provision

The HRD Ministry with the UGC and Vice Chancellors are working on a New Education Policy to develop recommendations and strategies to support implementation of the twenty identified themes for re-shaping higher education. The themes include: new knowledge; bridging gender, social and regional disparities; developing good teachers; regulatory reform; promoting open and distance learning; and internationalisation.

In addition, a review of UGC has recommended to Ministers that a National Higher Education Authority should take over all responsibilities and be established through an act of Parliament. The Bill is in draft but the review committee suggested that in the interim the HRD Ministry could

initiate change through an executive order.

Foreign providers: As part of the 'Make in India' campaign of the Prime Minister, the National Institution for Transforming India (Niti) Aayog has been asked to explore what new regulations, and criteria, might be needed to permit foreign institutions to establish branch campuses. It is suggested that such foreign campuses would not be regulated by UGC. Essentially, 'Niti Ayog'

wants to provide transparent and straightforward clearance measures for foreign education providers, with regulations that ensure that their own academic and administrative independence are not jeopardised.

Additionally, in June 2015, the Prime Minister met with officials from Niti Aayog, the HRD Ministry, UGC and the Commerce Ministry to consider how India might be transformed into an Asian higher education hub,

given that several foreign universities have expressed interest in setting up campuses in the country.

This interest shown by the Prime Minister raises the renewed possibility of removing entry barriers for foreign universities, however any Bill has to be passed by Parliament and there is likely to be similar deliberation and opposition to that previously experienced with the Foreign Education Bill.

17 For example refer to: 'Understanding India: The future of higher education and opportunities for international cooperation': British Council, India (2014); 'Indian Higher Education: Envisioning the Future': Pawan Agarwal (2009); 'Inclusive and qualitative expansion of higher education: the 12th Five-Year Plan (2012-17)': UGC, New Delhi (November, 2011)

18 Numbers in parenthesis show the actual number as on 31st March 2015. Source: All India Survey of Higher Education (2015), Government of India, MHRD, India

19 The legislative section is divided into three lists: Union list, States list and Concurrent list. Education was brought under the concurrent list in a 1976 amendment to the Constitution

20 The estimate is based on actual responses in All India Survey on Higher Education, 2013-14. (See table 3(a), MHRD, 2014). However the online survey conducted by MHRD, does not cover the entire population

21 'Managing Large Systems: A comparative analysis: Challenges and opportunities for large higher education systems': British Council (June 2015)

22 Gazette of India, page 3816, 21 September 2013. See: http://www.ugc.ac.in/pdfnews/9578034_English.pdf

23 For more detail see: <http://www.aicte-india.org/aboutaicte.php>

24 <http://www.ugc.ac.in/page/Professional-Councils.aspx>

25 'Policies and procedures for equivalence of qualifications'; AIU (June 2015) accessed: <http://www.aiuweb.org/evaluation/AIU%20Equivalence%20Information%20Brochure%2013.07.2015.pdf>

26 <http://www.aicte-india.org/foreignuniversities.php>

27 <http://www.aicte-india.org/approvalprocess.php>

28 For example established under the UGC Act or under due procedure approved through act of Parliament

29 <http://www.aicte-india.org/foreignuniversities.php>

30 Normally classified as Scheduled Castes (SC), Scheduled Tribes (ST) and Other Backward Classes (OBCs). See the UGC publication 'Nurturing Social Equity in Higher Education', accessed at http://www.ugc.ac.in/pdfnews/7580771_NurturingSocialEquityinHigherEducation.pdf

31 Gazette of India, p3816, 21 September 2013: http://www.ugc.ac.in/pdfnews/9578034_English.pdf

Section 4: Research and survey findings

- Many TNE partnerships award both foreign and Indian degrees.
- Most Indian institutions with TNE partnerships provide teaching full-time and face-to-face; few employed distance learning support from the foreign provider.
- Indian HEIs have proved successful in complying with UK QAA requirements.
- Cultural differences can impact strongly and need addressing from the beginning.
- A strong staff development plan is important and is for both partners.
- Setting fees according to student affordability was a vital consideration.
- Benefits for Indian partners: access to high quality programmes, speedy start-up of new programmes and staff development.
- Benefits to students: new approaches to teaching and assessment.
- Benefits for UK partners: international outreach, outward mobility of UK students, access to Indian business & industry and enhanced understanding of wider Indian HE.
- Foreign partners are poor at marketing their brand and potential added value to Indian students.
- Better arrangements need to be in place for teach-out when programmes need to close.

Fifty-six Indian institutions with foreign TNE partnerships at degree level were contacted, of which forty-two institutions were researched. These had upwards of 150 programmes; over half these HEIs were interviewed through visits, while others were contacted by email and phone. While fifty-six is not the full extent of TNE activities in India, it is a good representational sample, based on previous studies and knowledge of Indian partnerships.

Staff from ten UK universities were also interviewed, some with active links, others in development and some recently closed. The latter were included in order to understand reasons and also experiences of managing a programme closure.

The institutions were a mix in terms of levels of study, subject areas, location, ownership and the lengths of time of operation. A number of partnerships involving non-UK foreign partners were also researched.

Each programme reviewed displayed its own specific characteristics. The individual nature no doubt reflecting the market driven, entrepreneurial approach of many involved in TNE (particularly Indian private providers) where delivery models need to respond to student demand, affordability, regulatory requirements and differences in culture of the partner institution. This section therefore seeks to review all findings and identify common characteristics that might inform and facilitate the growth of new TNE partnerships.

4.1 The partners involved Indian partners

Most partnerships reviewed involved Indian private providers. No TNE degree delivery was identified involving public sector providers, although central and state universities and some research centres had various arrangements for student exchanges, transfer of credits or cooperation for doctoral research projects. When the characteristics of each provider surveyed was reviewed some of common features identified included:

- One fifth of the surveyed Indian HEIs had more than one campus or study centre;
- Some Indian HEIs surveyed were

universities and with their own DAPs;

- The majority of HEIs, with foreign degree partnerships, were affiliated to an Indian university for the purpose of also awarding an Indian degree;
- Seven of the HEIs surveyed were part of a large business/industry conglomerate;
- Five were operating in ‘niche areas’ and with modest enrolments (less than fifty per year to the TNE programme) – for example for design topics or specialist postgraduate programmes;
- All the Indian HEIs surveyed had other foreign partnerships, some for degree delivery and articulation, although most were student exchange.

UK partners

There were no obvious patterns concerning the UK universities involved, although those with the largest Indian operations were also those with large global TNE outreach (for example Oxford Brookes, Nottingham Trent and Staffordshire Universities and University of London International).

None of the TNE partnerships identified, involving the award of a degree in India, were with UK Russell Group universities, except for those offered through University of London International (e.g. London School of Economics degrees). There were a number of transfer agreements in place with Russell Group universities and others had partnership arrangements, for example for

research cooperation and short-term mobility or exchanges.

Evolution of partnerships

In most cases considered, partnerships had developed from an initial ‘scene-scanning’ visit by the UK (or other foreign) institution. A small number of partnerships were with individuals who had previous experience of working together as researchers or academics.

The majority of the UK partnerships identified had been in existence for ten years or more, although for some there had been significant changes since start-up. For example, a change of UK partner happened when the lead member of UK staff transferred to another UK university, taking the partnership with them. Approximately a fifth of the partnerships were post-2010, although many of the more recent ones involved US universities.

There had been review and/or renegotiation of agreements for many partnerships. The last decade has seen much change in the operating environment for Indian and UK TNE partnerships, for example new delivery arrangements, different financial circumstances and changing student demand. A further reason for partnership review has derived from the establishment in many UK universities of centralised management systems to oversee TNE partnerships, mainly to address concerns over risk (financial, quality and reputational).

A degree of consistency was apparent in that most partners took about a year to negotiate arrangements,

undertake due diligence and to plan delivery of the programme and associated activities. First recruitment and commencement of teaching had started over the second year, with a further year necessary to generate some impact.

A concern identified by those interviewed were cultural differences at both institutional and individual levels. These could be challenging initially and needed to be recognised; they might best be summarised as:

- Firstly, differences in approaches to teaching and learning;
- Secondly, variations in institutional culture, management, finance and governance;
- Thirdly, regulatory differences, both conceptual and in related to compliance.

The first included the need to encourage critical thinking amongst students whose previous education experience has been largely based around memorising facts and rote learning. This also had implications for teaching and assessment by the Indian HEI team.

Secondly there were large differences in the way institutions in India and the UK are structured and managed. The factor is that most Indian HEIs with TNE partnerships are private sector providers and for whom any losses would likely result in closure, whereas for the UK all were public providers.

The third area (regulatory compliance) was identified as both challenging and time consuming for it required

attitudinal and organisational change, plus the development of new systems and monitoring procedures to deliver to UK QAA requirements. In parallel the Indian partner also needed to build compliant approaches to satisfy Indian regulatory authorities and/or the needs of an affiliating university.

The most successful partnerships would seem to have involved a UK staff member spending lengths of time in India with the Indian team, working with them to establish jointly a robust approach to delivering and monitoring against QAA needs and also building an understanding of Indian regulatory requirements.

The important activities to commence during the initiation of the partnership were identified from the reviews to include:

- Agreeing an initial MOU to set out intentions;
- Initial feasibility studies with due diligence and planning (to include a draft financial and investment plan);
- Detailed contract negotiations, including the investment and financial plan;
- Detailed delivery plans to include: curricular, programmes, assessment procedures, schedules; staff training; quality assurance and other regulatory compliance needs;
- Monitoring and review.

Modes of delivery

The majority of the partnerships reviewed involved validated or

franchised programmes delivered entirely in India; typically at undergraduate level. This is also indicated in the UK enrolments' data provided in Tables A2 and A3.

Full-time study and face-to-face delivery were the norm, no part-time programmes were identified and there was little application of distance learning or other modes of delivery to supplement and support direct teaching.

As was also reported in Table A4 there were nearly 1,200 enrolments on UK postgraduate Master degree programmes delivered through various forms of distance learning. Two of these programmes were identified as being delivered through supported distance learning e.g. residential programmes (University of Warwick/IIM Ahmedabad³²) or supported by local face-to-face tutoring (University of London/Russell Square International College³³).

4.2 Subjects and enrolments

In approximate terms the majority of the partnerships (60%) identified were in business and related topics at both undergraduate and postgraduate levels. Within this area about a quarter were for undergraduate hospitality management.

The next most popular area was engineering and technology and accounted for a quarter of programmes reviewed - possibly more, given that some of the programmes involved multiple subject options. There was a strong interest in mechanical and electrical engineering,

with some programmes in computer technology.

Other subjects identified with a few programmes were healthcare and biosciences related and also various aspects of design (fashion, industrial, graphic).

There was considerable variation in total enrolments for the TNE programmes reviewed. The majority involved less than fifty new students per annum, although there was a small group of Indian programmes/providers with 150 to 650 new enrolments per programme each year. The number of students following Master degree programmes was more modest by comparison. Most postgraduate programmes involved approximately 30 enrolments with only one partner reporting over one hundred new students annually.

4.3 Finances and higher education

Under national legislation the 'commercialisation' of higher education is forbidden; institutions, however they are established, are required to operate as not-for-profit entities. Institutions must re-invest any surpluses generated for the development of education (although the concept of 'not-for-profit' might be open to some interpretation).

A real challenge for private providers has been to set fees at levels that target student groups might afford, and the same holds for their foreign TNE partnerships. As a starting point towards understanding Indian fees, student affordability and demand,

the fees set by some government institutions are presented below. Note that while government funded institutions largely determine their own admission and fee policies, they might also be subject to restrictions imposed by Government.

Institutions funded by Central Government: These institutions include the IITs and also central universities under UGC aegis (e.g. JNU, Delhi; University of Delhi and University of Hyderabad) together with specialist institutions. All derive the large majority of their funds from government but they also levy fees from students, and these can vary. Table 4.1 below provides examples of fees charged to students following programmes in these institutions.

State government universities: The majority of their funding derives from the state government with a small but significant proportion from fees received from students and affiliated universities. Typical student fees (2015 figures) are in the region of £100 to £150 per annum. For example, the fees for a BA programme at Lucknow University is approximately Rs6,045 pa (±£60) and a 2 year M.Com programme is Rs12,180 pa (±£122).

Public affiliated colleges: These tend to have the lowest fee levels, below those of the state universities to which they might be affiliated.

Private sector institutions: Fee levels for private universities are

very varied – from Rs 30,000 to Rs 500,000 (£300 to £5,000) per annum but see details below which consider fees at private institutions with TNE partnerships.

4.4 TNE partnerships & fees

The fee levels set by Indian private providers involved in TNE were reviewed and Table 4.2 details average fee for programmes with UK universities. The range of Indian and foreign fees can be summarised:

- Indian undergraduates: the student fees charged by Indian institutions ranged from £600 to £4,000 pa, although the majority were in the range between £1,200 to £2,000 pa;
- Indian postgraduate student fees charged by Indian institutions varied from £1,000 to £5,000 pa, with the higher sums for MBA programmes³⁴. There were two programmes with lower Indian institution fees (with US partners) but these were for transfer programmes, where the fees for the period in the US were above US\$20,000 pa.
- Undergraduate fee remittances to UK partners ranged from £250 to £950 pa. Lower fees were seen where economies of scale were possible (i.e. large enrolments) or when programmes involved students transferring to final year(s) at the UK campus and paying the UK international student fee.
- Postgraduate fee remittances to the UK partner: varied from £525 to (for one programme)

Table 4.1: Annual student fees of centrally funded institutions

Programme/Institution	Rupee fee (annual)	£ sterling approximate equivalent
Engineering related:		
IIT Delhi (BTech)	102,070	1,000
IIT Madras (MTech)	35,298	350
Management studies:		
IIM Ahmedabad (PGDM)	880,000	8,800
FMS, University of Delhi (MBA)	10,480	105
IIT Madras (MBA)	233,098	2,330
IIT Delhi (MBA)	51,000	510
Arts related:		
University of Delhi (St Stephens College)	30,900	510
Jawaharlal Nehru University (BA Humanities)	390	4

Source: Institution websites and communications (September 2015)
Note: Rs100 = £1 sterling

Note that fees are all quoted as an annual sum for ease of comparison; typically in India Master degree programme fees are detailed for the full degree duration.

Table 4.2: Average tuition fees and remittances to the UK institution for programmes delivered through validation and franchise arrangements.

Level	Indian institution (local fee) per student pa	Remittance (fee) to UK institution per student pa
Undergraduate	£2,180	£600
Masters	£3,670	£1,000

Notes:

1. The Indian institution fees are all charged in rupees; the £ sterling sums quoted above have been converted at the rate of £1 = Rs100
2. Fees are all quoted as an annual sum for ease of comparison.
3. One-off charges are not included, for example the application fee.

£3,500. Most of the others were in the range £750 to £1,250. Note there were fewer partnerships compared with those for undergraduates on which to base analysis.

revenues accruing from student fee remittances.

A number of UK universities involved in transfer arrangements did not charge for their support for the students while they were on the Indian component of their India (i.e. for validation, QA visits etc). They covered these costs through the international fees the students paid when they transferred to the UK campus. Discounts on these international fees were offered and amounts of 10% to 20% were reported as typical. Similar approaches were in place with US universities.

For most partnerships the £ sterling component of the annual fee (see Table 4.1) was paid direct to the UK university in £ sterling by the student. The Indian HEI normally advertised the foreign currency amount of the student fee as a separate item to the local Rupee fee. Indian providers preferred this approach as it was explicit, did not require them to manage foreign exchange fluctuations and also minimised tax complexities.

In only two of the cases surveyed the Indian institution had taken on this

responsibility, charging students an all-inclusive fee (in rupees) and then remitting a sterling amount to the partner. They commented that they were keen to re-negotiate contracts to minimise losses on foreign exchange and bank charges.

A consideration identified by both Indian and UK partners was the need to amend agreements (and financial arrangements) as the market evolved and as changes to the cost base occurred. Some partnerships had gone through significant contract renegotiation over time, including agreeing on minimum payments to the UK university, for others fees had been increased. Fee negotiations were always challenging, as one UK university staff member suggested:

‘Agreeing fees is always tough and Indian private providers drive a hard bargain. It is important to have a thought through negotiating strategy from the beginning’

The counter view expressed by some Indian providers was that:

‘Foreign partners often do not appreciate the level of financial risk that falls to us. Perhaps they should provide investment to the programme, then we would have a real partnership.’

4.5 Other remittances

There were a variety of other payments (in addition to student fees) that were identified and made by Indian HEIs to their partner institutions.

While the majority of partnerships did not involve a fee for validating the in-India delivered programmes, there were a few where payments occurred. Fees were charged every 3 years and were in the range of £7,000 to £11,000 per programme.

About one third of the Indian institutions interviewed said that they contributed to the costs of foreign partner visits, although practices varied greatly. Where support was provided the most frequently cited payment was to meet the costs of an annual quality review. However for the majority of the partnerships the costs of staff visits were met from the UK

4.6 Affordability and pricing

The student market in which private HEIs operate in India tends to be price-sensitive. It is also stratified and Indian private providers are very aware of the segment in which they operate (and their competitors). As was explained, Indian HEI fees of between £1,000 and £2,000 pa would seem modest by international comparison, mainly because levels must relate to affordability and also what both public and other private competitors charge. Note that very low fee public sector HEIs tend to attract many of the best students with private providers often only being a second choice option – a similar situation as is seen in many Asian countries.

The major factor in most students' choice of an institution is the likelihood of future employment: essentially perceptions of the enhanced future employability associated with the provider and their programmes. Foreign providers also operate in this market and thus the brand of the foreign partner institution, and its perceived added value in the Indian and international market, is an important consideration. This implies two areas for action:

- Careful strategic pricing;
- Promotion and profiling the foreign university's brand in the Indian market.

4.7 Student support

It was not possible to include research into student satisfaction as part of this study, however the comments below are based on feedback from Indian and UK staff.

Arrangements for student support were very mixed. The best-case examples were where Indian students had exactly the same access to the UK university's virtual learning environment (VLE) as students based on the UK campus. This would include for all materials, some archived lectures and on-line library access. This open and identical approach was much appreciated by Indian partners as was similar access provided to their staff.

UK universities involved, if not offering full VLE access, did normally provide the on-line library facility for TNE students. A small number of UK institutions were reported not to be providing any such access, and this was negatively commented upon by Indian partners. In two cases reviewed it was explained that internet access to the UK university from India was unreliable, so the UK university had provided their Indian students with CDs that included course details and support materials.

UK staff commented that they had found it very important to be involved when a new cohort of students commenced; this particularly so as to introduce the students to the UK university's expectations, explain the detail of the programme and introduce the new approaches to critical thinking and assessment.

UK approaches to assessment were generally new to Indian staff, involving project work, lengthier assignments and also assessed team projects. Concerns from the Indian teams included plagiarism and fair assessment for individuals in team

projects. These were areas that needed to be addressed through the staff development programme, reinforcing its importance.

Some programmes required work placements and this was a particular need for hospitality management courses. UK partners commented on the success of these and that Indian partners had strong business networks through which they were able to operate. Previously transfer arrangements to the UK also involved placements in UK businesses, and the loss of these opportunities, due to immigration changes, had negatively impacted on twinning and articulation programmes.

There was variation in the way UK universities perceived of alumni graduating from their TNE programmes. The best partnerships gave all alumni equal status, wherever they might have studied. A focus on alumni is becoming more important internationally, particularly the potential they offer to enhance the brands of both partners, and support their local marketing efforts.

4.8 Regulatory compliance and quality assurance

The complexities and challenges to meet both UK and Indian regulatory compliance are discussed below; neither set of requirements is straightforward and it was the most common theme referred to by staff interviewed for this study as having been challenging.

Indian compliance

Most TNE partnerships surveyed related to management and technology disciplines, all of which would normally fall under the aegis of AICTE. The following summarises the quite mixed findings from the surveys:

- Approximately a quarter of the partnerships had formal AICTE approval, some were going through the application process, and others might have AICTE approval for a diploma programme that fed into the degree programme;
- A quarter had a NAAC rating;
- Approximately a half reported that they only awarded the foreign partner's degree.

Generally no double or joint degrees involving Indian institutions are recognised by AIU; however students following TNE partnership programmes that were also affiliated to an Indian university, would receive two separate degrees – from the foreign university as well as the Indian award. This was reported to be useful as the Indian degree ensured the student Indian formal compliance and the foreign award facilitated international recognition and mobility. Indian university affiliations associated with TNE partnership delivery have grown significantly over recent years.

While concerns were expressed regarding GOI 'non-recognition' of some foreign degrees, Indian providers did not see this as a major issue. The large majority of their students following TNE programmes only sought employment in the private sector, where government

recognition was not an issue. Further the trend of Indian HEIs also to have an Indian university affiliation for a degree award for the TNE partnership programme, provided for GOI recognition.

UK regulatory requirements

All the Indian partners interviewed commented upon the challenges they had experienced regarding UK QAA requirements and establishing systems for control and regular monitoring of compliance. However, once mastered partners were generally appreciative and considered they now had a 'gold standard' benchmark against which to compare others.

The best practice to ensure compliance identified, included extended periods in India by a staff member of the UK partner to work with the local team, develop systems and train managers and academics. The large majority of partnerships went through an annual QA review, including involving an external assessor. However a few Indian partners considered that their UK partner was not spending sufficient time with them to review procedures once the programme was launched, even though the fees paid were meant to include this.

4.9 Staff development

It was clear from the staff interviews that the most successful arrangements were those where the staff had a real rapport and where a strong partnership team had grown. Investment in team-building was seen as essential.

All forms of engagement (and investment) in staff development were emphasised as vital for the success of programmes, given the different approaches to teaching, learning and assessment. And this was seen as two-way as UK staff also needed to understand how to operate in an Indian culture and educational context. Some important areas for focus identified in the staff interviews included:

- The majority of partnerships involved Indian staff following the regular PG Certificate/ Diploma programmes from the UK university i.e. the same programme that most academic staff in the UK are required to follow. These programmes covered areas such as teaching and learning, curriculum and programme development, assessment procedures, assignments and teamwork. Some programmes were accessed on-line, some through periods at the UK university and also supported during UK staff visits to India. Two Indian partners were sufficiently impressed and had adopted the UK programme for all their academic staff in India; others had taken specific components to deliver;
- Staff development was an on-going need and was reported to be an important shared activity. However a small number of Indian partners considered that while initial training had occurred there had been only limited follow-up;
- It was agreed that time spent in the UK with the partner was

generally very useful to enhance staff capabilities. However several partners commented that travel and accommodation costs were too high to fund routinely;

- There were only two cases identified where Indian staff were enrolled in PhD programmes with the UK partner – professional doctorate and ‘split’ PhD. Some UK universities regularly offer ‘free’ doctoral level training opportunities for staff from their TNE partners in other countries.

4.10 Service provision

From the Indian partner

The majority of service provision and student support were the responsibility of the Indian partner. These included:

- Pre-programme: including marketing, recruitment and the management of applications, all communications with prospective students;

- Delivery: teaching, provision of teaching and learning facilities and materials, organising work placements, overseeing exams, assessment and awards. Social and welfare services;
- Follow-up, some include employer introductions on graduation (note that in India this assistance in securing employment is often referred to as ‘work placement’).

For some Indian HEIs, campus based accommodation is standard and provided for many students. The costs are often included as part of a comprehensive fee for the total programme and this is the preferred approach for many Indian families.

From the UK partner

The services provided from UK universities were reported to be very varied. There were good examples identified of strong engagement by UK staff (and much preferred by Indian partners), for example services might include: assistance in developing QA procedures; staff training (on-going);

involvement in student selection; regular visits (two or three times per annum); local contextualisation of some programme content; teaching support at key times; QA visits, including with an independent assessor; direct involvement in assessment; student access to VLE and other ‘home campus’ resources; degree ceremonies; alumni engagement.

However some UK providers were seen as only offering the most basic support comprising ie contribution to student selection, an annual visit to review QA compliance and support for and checking of assessments.

4.11 Marketing services and support

Activities to support marketing and recruitment were typically the responsibility of the Indian HEI. It was commented that additional direct involvement by the UK partner might enhance their profile; examples included through joint promotion in India and the inclusion of reference to Indian TNE partnership programmes on UK institutional web pages and

promotional materials. Only five of the Indian HEIs interviewed mentioned the use of local agents to support their recruitment efforts.

UK and Indian partners suggested that more pro-active involvement of the British Council to promote UK TNE activities in India would provide an added seal of approval.

The current efforts by the British Council to negotiate recognition of the full range of UK degrees, delivered in both UK and India, was reported to be welcome. The British Council also provides 'No Objection Certificates' (NOC) for the delivery of programmes by a UK Institution in partnership with an Indian HEI that is a pre-requisite to accompany an application for AICTE approval³⁵.

4.12 Partnership closure and teach-out

The surveys intentionally included interviews with staff from five partnerships that had closed. All the closures reviewed were at the instigation of the UK partner and in each case there remained residual resentment in India, particularly because some withdrawals had been at a relatively short notice, causing problems as students had been recruited.

UK partners interviewed suggested a number of reasons why closures had occurred, and these included some or all of the following:

- i. Revenue: declines and/or expectations not met

This might have been due to a number of factors including enrolment decline given market evolution or greater competition (including from new public sector HEIs). Several UK interviewees also mentioned that the original enrolment projections, on which their financial model was based, had been overstated – and often by the original UK academics involved in developing the relationship.

Another major impact had been the collapse of some transfer arrangements (i.e. twinning and validation programmes), including for internships, due to changes to UK immigration procedures. The full (or discounted) international fee revenue paid while students were in the UK was often the basis for the partnership's financial viability.

- ii. Quality assurance.

Risk concerns relating to quality assurance was mentioned a number of times, although there was good evidence that Indian partners had prioritised UK QAA compliance. The QAA country review of 2009 was generally very positive and identified many examples of good practice and commitment, as well as indicating a few areas that needed to be addressed.

- iii. Not aligned with the university's international strategy.

UK universities have become focused on developing and delivering integrated international strategies to ensure impact in identified countries and sectors, and a few programmes had closed as a result of review against wider strategic

interests. One partnership had closed because of conflict of interest: the UK university concerned had two similar arrangements with competing Indian HEIs and one of these required closure.

Whatever the reason for programme closure might have been, detailed arrangements for the teach-out had to be agreed; this always had cost implications for both partners and in the face of declining revenue. Teach-outs will always be a challenge, particularly if one partner feels it has been forced upon them, the QAA sought to address this in the more effectively 2009 study³⁶ and commented on the need for regular reviews of agreements:

'..... agreements are drawn up include specific provisions to protect students' interests in circumstances such as termination of the agreement..... however while agreements were in place, they were not always kept up to date to deal with changes that occurred the existence of a relevant and up-to-date agreement is extremely helpful in guiding the partners should something go wrong in the relations between them.'

4.13 Motivations and benefits

During staff interviews the possible motivations associated with developing TNE partnerships were explored. A variety of reasons were given and below is a brief summary of the main ones:

For the Indian partner

Offers students quality assured, reputable programmes, with a focus on employability;

- Facilitates the speedier development of quality programmes;
- Partnerships result in staff development and new (and innovative) approaches to teaching;
- A foreign degree is attractive as it enhances opportunities for accessing international employment;
- TNE offers study opportunities for a foreign degree at a more affordable price for the students – compared with studying overseas.

UK partner

- India is a priority country and TNE partnerships enhance understanding and access to India's higher education sector;
- TNE partnerships and their applied nature, have facilitated links with Indian business and industry;

- Partnerships can lead to research cooperation
- Partnerships can promote and support wider 2-way student exchanges;
- TNE presence encourages more students to follow UK degree programmes (both in India and the UK)

Other benefits

The important benefits accruing through transfers and direct recruitment to the UK campus as a direct and/or indirect result of TNE partnerships, were discussed in Section 2. Additionally other benefits were apparent where relationships had grown beyond TNE delivery: firstly student exchanges had resulted in more UK students spending time in India, with some gaining credits for their UK programmes. Secondly UK university access to business and industry in India for partnerships and placements.

There was no significant research cooperation reported as growing from the TNE partnerships reviewed;

this appeared to be mainly due to the Indian partners being, in the main, private sector providers with little or no research capabilities. However there were growing and deeper research collaboration and staff exchanges involving public universities and research centres, with shorter-term student and researcher mobility arrangements.

A growing network of Indian alumni was also considered to be a great long-term asset. Although the full benefits to institutions that they might offer are not yet being exploited.

With the increasing global outreach of both Indian and UK universities it is interesting to note that some of the in-India cooperation has extended to delivery to students based in third countries. One of the case studies identified such a partnership growing in Thailand. A further example is that of Westford College and the University of Wolverhampton where students might be mobile between Kerala and UAE³⁷.

32 <http://www.wbs.ac.uk/news/2012/04/18/Memorandum/of/Agreement>

33 <http://www.rsiccollege.org/about-us.html>

34 Note that fees are all quoted as an annual sum for ease of comparison; typically in India Master degree programme fees are detailed for the full degree duration.

35 All Indian Council for Technical Education Approval Process Handbook (2015 – 2016)

36 'Audit of overseas provision, India. Overview report' (July 2009). Access through QAA website: <http://www.qaa.ac.uk/en/Publications/Documents/Audit-overseas-provision-India-Overview-July-2009.pdf>

37 Westford College: <http://www.mywestford.com/mba>

Section 5: Conclusions and recommendations

5.1 TNE opportunities in India

This study has explored in some detail the delivery of TNE in India and demonstrated that there are good opportunities for UK partnerships with Indian institutions; in overall terms:

- The growing demand for higher education has opened up opportunities for TNE partnerships, predominantly with Indian private institutions;
- The new Indian government and the various official HE organisations have become increasingly facilitative in relation to internationalisation and encouraging partnerships.

However some barriers remain, particularly around student affordability, inconsistencies in regulation requirements and the recognition of foreign degrees.

Partnerships that offer economies of scale, address gaps in the Indian provision and are in areas where UK has comparative advantage have a better chance of success. Most TNE opportunities are with private colleges and private universities or deemed private universities.

Postgraduate programmes delivered fully in-India appear to have bigger growth prospects, followed by undergraduate programmes where the pricing is right.

There is potential to develop twinning and articulation partnerships, particularly where internships might be offered as part of the programme.

Consideration for growing new approaches at postgraduate level should be assessed.

Indian students are turning in increasing numbers to access on-line and other distance programmes and UK enrolments have grown steadily. This demand will inevitably grow.

Many of the university staff recruited to teach in the new HEIs lack doctoral level training, the normal pre-requisite for academics in India. The UK with its flexible approach to split PhDs, professional doctorates and joint supervision is in a good position to provide innovative solutions.

A number of Indian institutions are looking for summer programmes, project work, semester or half a semester programmes at undergraduate and postgraduate levels. There is also interest in dual degree arrangements eg with twinning and/or validation arrangements.

As has grown in many other countries, TNE partnerships typically involve blended approaches to delivery in order to meet student needs more appropriately. Flexibility is important with combinations of modes offering full-time, part-time, distance learning and transfer possibilities, thus improving student choice and attractiveness.

5.2 Who benefits from TNE programmes in India?

Many of the UK TNE partnerships reviewed had given rise to strong and enduring individual and institutional relationships; there is every indication

that they will continue to flourish and offer new directions in the future. A brief summary of the various benefits identified by staff interviewed included in table 5.1 (next page).

5.3 TNE arrangements: institutions and their students

The large majority of TNE programmes in India are delivered in some form of partnership with an Indian private college or university. While it would sometimes be desirable to partner with a government institution, their fees are capped at too low a level to meet the additional costs of foreign involvement.

It is important for the UK provider to understand how Indian private providers operate, the markets from which they recruit, their willingness/propensity to invest, their governance, regulatory compliance and their finances and to recognise the 'non-commercialisation' requirement. All such factors must be considered in some detail in any due-diligence assessment.

Indian private providers have to compete hard to recruit students, in spite of the continuing demand growth for HE across India; they each target specific student populations in terms of their affordability and location. Careful pricing strategies and strict cost control are normally necessary to respond to the competition. The same situation pertains for those with TNE partnerships, whose total student fees are normally higher than the average for private HEIs.

Table 5.1 Summary of benefits accruing from TNE partnerships

Benefit to	Nature of benefit
Indian institution	<ul style="list-style-type: none"> • Facilitated speedy development of quality programmes; • Offered students quality assured, reputable programmes, with a focus on employability; • Improved quality of student experience with new approaches to learning, critical thinking and access to learning support from the UK; • Enhanced employability of graduates, both domestically and internationally; • Contributed to staff development through new (and innovative) approaches to teaching, opportunities for acquiring research degree and PG Diplomas; • Better understanding of need for rigour in quality assurance, supported by strong systems; • Provided students a more affordable option to acquire a foreign qualification, compared with studying internationally; • Revenue enhancement.
UK institution	<ul style="list-style-type: none"> • An important component of the university's integrated international strategy to build brand, visibility and make market entry; • Partnerships and their applied nature, had facilitated links with Indian business and industry; • Partnerships offered opportunities for research cooperation; • Facilitated the growth of 2-way student exchanges, including outward mobility of UK students; • TNE presence in India encourages more Indian students to study at the UK campus; • Revenue generated to meet costs; • Enhanced understanding and access to the country's higher education sector.

The average fees for HEIs active in TNE were identified to be in the range of £1,200 to £2,000 pa with the fee paid to the UK partner normally being an addition to this. However there were also a small but significant number that charge over £3,000 pa. This would suggest that UK TNE programmes in India mainly attracted students from middle class families, able to afford fees for private HE, but probably not sufficient wealthy to fund international study.

In this context it is important to demonstrate to potential students the value addition associated with the TNE programme, the degree to be awarded, the institution's reputation, enhanced employability and quality of the learning experience.

Given the dependence on the private sector and student affordability it is noticeable that partnerships are more likely to be found in the more wealthy metropolitan areas (Delhi and Mumbai) and southern and parts of western India.

5.4 Understanding cultural differences

The most successful TNE activities appear to have flourished where team building across the partnership was prioritised. Partners also identified that underlying cultural differences need to be recognised, addressed from the inception of the partnership and that these differences could be at both institutional and individual levels. Addressing these concerns was an important component of staff development programmes.

- **Teaching and learning:** particularly different learning cultures, for example the encouragement of critical thinking amongst students, with new approaches to teaching and assessment.
- **Institutional culture, management and governance:** differences in the way institutions in India and the UK are structured and managed, including that most Indian TNE partners are private sector providers whereas all UK partners were public providers. Internal systems and delegated authorities were often very different.
- **Compliance and regulatory systems:** this could be both conceptual and system specific and was challenging and time consuming, requiring two-way attitudinal and organisational changes.

5.5 Responding to regulatory requirements

The changes to regulations relating to TNE management, delivery and recognition, from UGC and AICTE are generally facilitative. These allow for both foreign degrees delivered in India through some form of collaborative delivery as well as transfer arrangements involving twinning and validation arrangements. All UK universities should be able to develop such arrangements as they have DAPs and meet the Indian need for the foreign institution to be a 'reputed university'.

The subject spread of the current UK-India TNE programmes all fall within

disciplines over which AICTE has its remit.

A further consideration from AICTE/UGC requirement concerns parallel affiliation arrangements with an Indian university for the award of a degree. This is identified as important to help ensure, in any eventuality, students could access both a domestically recognised degree and a foreign degree. While the UGC mentions this specifically for twinning arrangements, it would seem a useful arrangement also for other collaborative delivery programmes. Most of the programmes reviewed offer these options.

Distance learning

The UK has been very successful in growing global distance learning enrolments, and achievements in India to date have been relatively modest and at a lower growth rate than seen in other Asian countries. There is good indication of Indian demand but the current GOI policy of non-recognition of foreign distance learning degrees is a barrier to entry.

Although even for this latter consideration, change seems inevitable given the wide global availability of these programmes, including from some top international universities; the growth of online content domestically; and Indian government universities offering MOOC and DL programmes globally.

For UK universities the strict and transparent QAA compliance requirements for their programmes will greatly strengthen any representation for Indian recognition.

Transfers involving articulation and twinning

This study identified that there had been a drop in the numbers of students transferring to the UK through some form of twinning or articulation arrangement over the last three years. This was reported by both UK and Indian staff interviewed to be a direct consequence of the visa regime. However, even the current lower level indicates that up to a fifth of all new Indian undergraduate enrolments to UK campuses are through transfers. The value of these programmes to the UK was possibly £14 million in 2013-14.

However, there remains demand for articulation and twinning programmes, the challenge has been that institutions could not guarantee to their students that they would be able to transfer, given the visa uncertainties. A twin approach is recommended that involves parallel Indian degree through affiliation (also a AICTE requirement) and more proactive support from the UK partners to ensure UK visa compliance.

International branch campuses

Recent announcements by the Modi Government concerning internationalisation of higher education and the adoption of more liberal policies, serves to indicate further opportunities, including re-opening the possibility of foreign branch campuses. A factor influencing this is recognition that Indian universities are themselves operating globally with branch campuses.

Revenue

The fee component that UK

universities have been able to charge for TNE programmes in India are competitive and generally in line with those found in other countries e.g. Malaysia, China and Hong Kong. The difference for India has been that for many programmes enrolments are modest which reduces the potential for delivering economies of scale. The decline in the number of Indian students transferring has hit several UK universities hard. Their business case was often premised on a number of students transferring to the UK campus and paying UK international fees.

Recognition and equivalence of foreign degrees

AIU has recently published new guidelines setting out the approach to the recognition of foreign degrees recognition and these would seem more facilitative than previously, including to allow for degrees delivered in India, acceptances of transfer programmes and consideration to academic rather than calendar duration of degree programmes.

The main need for formal recognition occurs when the degree holder wishes to obtain employment in the public sector, requires some form of professional recognition or wants to enrol for a higher degree programme at an Indian public institution. However formal recognition was not identified as a normal need by private HEIs as their students all tended to work in the private sector where government compliance was not necessary.

The efforts by the British Council to negotiate recognition of the full range of UK degrees, delivered both in UK and India, was reported to be welcome by all interviewed.

5.6 Examples of good practice

The study identified many excellent examples of good practice involving both UK and Indian partners, some of these included:

- Investment in team building and recognition that this needs to be on-going investment and from both sides;

- Ensuring that students had the same access to support systems as those on the UK campus;
- Constancy in both UK and Indian teams – but also ensuring systems were in place and that succession planning provided for any staff turnover;
- Staff training that also offered access to postgraduate qualifications;
- Close cooperation to ensure full regulatory compliance; best examples were where a UK staff member was attached for periods with the Indian partner;
- Capitalising on the partnership to grow other forms of cooperation (research, staff and student exchanges) and thereby strengthen the relationship;
- Joint planning and sharing to secure joint understanding of requirements and risks.

5.7 Areas of concern associated with delivery

Market related: While there has been overall enrolment growth to UK-India

programmes some of the partnerships have experienced enrolment decline and others had to close. Problems were probably due to a combination of reasons including greater competition for students driving down fees; high profile press coverage concerning the recognition of foreign degrees; and increasing demands placed by UK providers as they seek to reduce exposure to quality and financial risk. The net effect of these has been that some Indian private providers are turning away from foreign partnerships and looking to more (lower cost) in-India affiliation arrangements.

Organisation of delivery: A number of areas of concern from both Indian and UK perspectives were identified, considering first Indian partners:

- Short notice of programme closure with only limited arrangements for teach-out;
- All financial risk taken by the Indian side, with some suggesting that UK financial investment in the partnership might concentrate efforts;
- UK universities running TNE programmes as a business and not an academic partnership;
- Student support in some partnerships lacking; limited access to the UK university's Virtual Learning Environment;
- Limited effort to develop staff, with few UK universities offering research/doctoral level training within the partnership.

The main concerns from the UK side tended to be finance and quality related:

- Enrolment numbers proposed at the planning stage were not realised;
- Underinvestment in staff development, Indian partners reportedly worried that they would lose trained staff to competitors;
- There was limited appreciation of UK staff costs, both direct and indirect;
- The time taken to develop quality assurance systems and to monitor and maintain.

5.8 Marketing

There are gaps in the marketing of UK-India TNE programmes in India:

- In India marketing is left entirely to the Indian partners, when some high profile involvement of the UK partner might enhance the brand and opportunities on offer;
- UK institutions rarely include details of the in-India programmes on their webpages or in other promotion materials;
- The 'official' UK presence in India (British Council, British High Commission) might consider a supportive marketing drive to for UK TNE opportunities;
- Currently there is little marketing in India of the great variety of distance learning programmes on offer from UK universities.

5.9 Recommendations

1. UK universities and the British Council should identify niche and specialist areas for the development of UK-Indian TNE partnerships, this through both desk research and workshops with Indian private providers and UK universities.
2. Indian HEIs and UK universities should explore, individually and jointly, opportunities to develop TNE partnerships; the British Council might facilitate this through a strategic guide to the key factors (for each country's institutions) that need to be considered at the 'market scanning' stage.
3. British Council should survey Indian institutions interested in collaborating with UK institutions and establish a list to be made available to UK universities; inclusion on the list would require certain criteria being met.
4. UK universities and the British Council should promote more directly to potential students UK-India TNE programmes, for example through web based marketing and education events.
5. UK universities and British Council to promote the full range of UK degree level distance-learning programmes.

Section 6: Ten steps towards a UK-India TNE partnership

1. Initiating activity – market scanning

- **University international strategy:** Have a clear understanding of where growing TNE partnerships in India might fit within the university's strategy, and how programmes might relate to achievement of other institutional priorities in India.
- **Market scanning and analysis:** undertake initial market research to assess the demand for a particular subject, level and preferred modes of study in India.
- **Identification of potential partners:** visit a selection of potential partners; such visits help to build up an understanding of likely demand, assess how different providers might be positioned in the market and identify those with realism and rapport. An Indian based organisation might be in the best position to assist in initial identification against a specified profile of requirements.
- **Understanding motivations** (from both sides): a key aspect of initial identification is to understand the respective motivations of both partners for growing the relationship and where there might be mutuality of aims and likely benefits.

2. Initial planning

- **Due diligence:** Initial due diligence on the institution and the programme should be undertaken to assess a few key factors about the institution, including: current regulatory

compliance and recognition; legal and financial status, turnover; current programmes on offer; staffing levels; (for India) university affiliations for degree awarding; likely demand - student numbers, current and projected; fees and affordability in the student market segment addressed; other potential benefits from the partnership.

There are Indian education companies that can offer services to provide identification and initial assessment of potential partners. A more detailed due diligence will be necessary prior to finalising a contract.

- **Initial business and financial plan:** Based on the preliminary research an outline finance and business plan should be formulated to help clarify when and how partnerships might be viable and for both partners. This should be a shared undertaking and with an agreed risk management strategy. Business plans should be regularly reviewed and updated, including when better information becomes available.
- **Memoranda of Understanding:** An overarching MOU to set out the broad approach to the partnership and the areas to be addressed, including a proposed planning schedule towards start-up, timelines and respective responsibilities and/or commitments, should be agreed. Such MoUs often prove an important means towards securing support, initial investment and commitment from the respective university bodies and staff. (Note: Legal advice should be taken from

the legal representative at the university).

- **Enrolment projections:** UK partners most frequently identified as a problem incorrect student demand, and in many cases forecasts had proved to be over-optimistic. A risk management approach is suggested with the impact of various enrolment scenarios run through the financial plan to assess viability.
- **Time schedule:** Allow for the planning activities and agreements for a new partnership programme to take about a year. This then allows for launch towards the end of the second year.

3. Assuring Indian and UK regulatory compliance

- **AICTE/UGC Approval:** It is a GOI requirement that the relevant authority approves all foreign degree partnerships; in most cases this would be AICTE. Outside of the AICTE subject areas then UGC approval would normally be necessary. However submitting for AICTE (or UGC) approval is the responsibility of the Indian partner, although foreign partner involvement is recommended. The references and links to all guidance relating to AICTE approval. See:
 - <http://www.aicte-india.org/foreignuniversities.php>
 - <http://www.aicte-india.org/approvalprocess.php>
- **'No Objection Certificate':** The Indian requirement is for the foreign

partner university to be a 'reputed university'; the Indian authorities require the British Council to issue a 'No Objection Certificate' for a UK partner university as formal confirmation of repute.

- **UK regulatory compliance:** management systems in Indian HEIs are different from those in the UK, and it requires real effort for Indian partners initially to understand requirements and develop structures to ensure QAA compliance. The most effective approach is for a designated member of UK staff to spend time working with and training Indian partners. As part of this they would also understand and mediate on Indian regulatory and affiliation needs.

- **Equivalences:** In most cases AIU is the final arbiter; exceptions being for programmes requiring professional body recognition. However AIU, as yet, do not recognise foreign degrees delivered in India or those awarded through distance learning arrangements. For these reasons it is recommended that the Indian institution involved also seeks affiliation for the programme with an Indian university.

4. Deciding delivery Modes

- **Collaborative delivery:** The nature of each partnership will have its own variations that most appropriately relates to the cultures of the institutions involved, their lead managers, the needs of the student groups targeted and the costs to support. It is not useful to be

prescriptive beyond ensuring other factors (outlined in this Section) are considered in deciding on which approach to adopt.

- **Transfers to the UK campus:** these typically involve twinning and validation arrangements and have proved successful, including to ensure financial viability. The challenge is UK visa compliance and this has two specific implications: firstly close checking of student visa applications, to ensure compliance, and secondly the need to have a degree awarded in India, both from the UK university and also through affiliation to an Indian university. This latter is also required for UGC approval of twinning arrangements.

5. Business and financial plan

- The initial plan (see above) provides a framework but needs to be updated and expanded as more accurate data become available, particularly on likely enrolments, time scales and investment needs. This study has indicated as guidance the current fee ranges for TNE in India, and likely affordability within the main student groups. To minimise foreign exchange complications it is normally best to express the UK portion of the fee in Esterling.

6. Contracting

- Agreeing a mutually acceptable contract can be time consuming. Two key points that have proved contentious: firstly negotiating financial arrangements and secondly making provision for responsibilities when it might prove

necessary to close a programme.

- **Delivery arrangements:** the respective responsibilities for delivery identified in current partnerships were outlined in the main report and these might offer guidance for agreeing demarcations of responsibilities.
- **Risks and assumptions:** A risk management strategy needs to be in place with main risks (and assumptions) and their likely impact identified, and with routine monitoring arrangements in place. This should be shared and it would form part of each institutions overall risk management. The main areas to address include over optimistic financial expectations, concerns over quality, poor market assessment, lack of appropriate marketing experience, concerns over award recognition and an unclear value proposition.

7. Staff development - respecting cultural differences

- Staff development must be planned from the outset. It is important for both sets of staff in the partnership and it needs to be on-going. In addition to the technical needs for quality assurance and support for teaching and learning, team-building across the partnership was identified as an important factor in securing success. Good practice in Indian staff development involves access to the UK universities postgraduate training programme qualifications for staff and possible enrolment on doctoral research programmes.

- Three areas where cultural differences might impact in the running of a successful partnership were identified to be:
 - Approaches to teaching, learning and assessment;
 - Institutional cultures, management and governance;
 - Understanding and meeting regulatory compliance for both countries.

These need to be understood. Any emerging concerns should be surfaced and supported by staff training arrangements.

8. Programme delivery

- **Student support:** The key criterion is to ensure that students in India have access to a similar suite of learning support and materials as their counterparts in the UK. Typically this includes access to the VLE in the UK – or as much as local bandwidth might allow. Alternatives where IT infrastructure is limited include the provision of CDs with appropriate materials.

- **Marketing:** A key factor is to demonstrate to students that the programme on offer, and the institutions involved provide real added value relative to competitors. Market research on how best to reach the target group of students is required. This has implications for marketing and brand promotion. To date much of this has been left to the Indian partner – even though it is in the interest of both to succeed.

- **On-going QA and compliance:** For UK compliance, key documentation needs to be in place and monitored frequently. Monitoring of compliance is a standard task during UK staff visits and all institutions surveyed reported a formal annual review. Video conferencing was seen to enhance this.

9. Programme closure and teach-out

- All programmes will eventually come to an end and termination should never come as a surprise, especially if the partnership has operated as a team, sharing plans

and monitoring progress. Contracts should provide for teach-out, with responsibilities clearly outlined. Financial arrangements should be clearly outlined.

- An undergraduate degree programme will normally be a minimum of three years, and this implies a minimum commitment of five years to the students if problems occur and closure becomes necessary.

10. Longer-term follow-up

- Alumni from TNE programmes appear to be an underutilised resource. Arrangements to incorporate these alumni within normal alumni programmes would likely be beneficial to all, for example to assist marketing and reputation building.

Annex A: Main data tables

Table A1: All country TNE enrolments for UK universities for all levels of study according to leading student location countries.

	Partnership	Branch campus	Distance learning	Total
Total	499,480	19,615	119,755	638,850
Proportions	78.2%	3.1%	18.7%	100.0%
Malaysia	67,635	5,145	4,660	77,440
China	42,732	5,535	1,968	50,233
Singapore	34,281	60	15,728	50,068
Pakistan	40,342	-	3,089	43,431
Nigeria	23,103	-	5,352	28,455
Hong Kong (SAR)	21,315	233	6,847	28,395
Ghana	15,290	-	1,841	17,131
Oman	14,953	-	720	15,673
UAE	5,403	6,550	3,318	15,271
Egypt	14,074	-	639	14,713
Ireland	8,621	15	5,004	13,640
Sri Lanka	10,958	-	2,659	13,617
Greece	11,691	-	1,528	13,219
India	10,499	367	2,056	12,922
Mauritius	11,328	705	813	12,846
Trinidad and Tobago	8,551	-	4,263	12,814
Kenya	9,727	-	1,357	11,084
Russia	5,413	-	4,023	9,436

Source: HESA AOR (2015)

Table A2: TNE enrolments for UK universities for Bachelor degrees delivered through some form of partnership in India, according to leading universities involved.

	2010-11	2011-12	2012-13	2013-14
Total	5,345	5,898	6,025	8,564
Oxford Brookes University	2,131	2,314	2,802	3,360
Nottingham Trent University	N/A	N/A	N/A	2,125
University of Bradford	757	892	718	661
University of Huddersfield	712	658	625	601
Staffordshire University	436	848	606	376
University of Lancaster	292	382	388	349
Birmingham City University	N/A	N/A	136	344
Edinburgh Napier University	345	352	327	334
Queen Margaret University, Edinburgh	133	110	177	182
De Montfort University	149	113	134	146
University of Wales (central)	390	229	112	88

Source: HESA AOR (2015)

Table A3: TNE enrolments for UK universities for Master degree programmes delivered through some form of partnership in India, according to leading universities involved.

	2010-11	2011-12	2012-13	2013-14
Total	1,420	210	1,755	1,400
Coventry University	-	1,030	880	755
University of Lancaster	235	315	330	305
Cardiff Metropolitan University			50	120
University of Wolverhampton			35	80
Middlesex University	5	5		40
Edinburgh Napier University				30
Institute of Education				25
Oxford Brookes University	5	5	35	15

Source: HESA AOR (2015)

Table A4: Indian distance learning enrolments at UK universities for Master degree programmes, according to leading universities involved.

	2010-11	2011-12	2012-13	2013-14
Total	760	755	1,145	1,180
Coventry University	-	-	395	425
University of London	12	120	125	130
University of Warwick	135	110	90	110
Heriot-Watt University	60	80	65	85
University of Leicester	125	65	70	50
Robert Gordon University	50	50	45	45
University of Liverpool	15	45	45	40
London Metropolitan University	20	10		25
King's College London	15	30	25	25
University of Manchester	20	30	30	25
University of Dundee	5	10	15	20
University of Edinburgh	5	10	10	20

Source: HESA AOR (2015)

Table A5: Indian distance learning enrolments at UK universities for undergraduate degree programmes, according to leading universities involved.

	2010-11	2011-12	2012-13	2013-14
Total (All)	541	563	745	831
University of London International	378	448	555	715
University of Oxford	34	46	94	74
Open University	3	2	5	7
University of Derby	5	3	7	6
University of Portsmouth	6	8	6	6
University of Sunderland	1	12	11	5
University of Hertfordshire	3	2	6	4
University of Leicester	4	3	3	3

Source: HESA AOR (2015)

Table A6: Articulations from India to UK universities according to year of commencement in the UK and levels of study.

	Year of programme transferring to in UK				Total
	PGT	Undergraduate			
	Year 2	Year 2	Year 3	Year 4	
2008/09	280	330	435	40	1,085
2009/10	595	400	440	30	1,465
2010/11	415	355	425	10	1,205
2011/12	225	290	285	10	810
2012/13	10	280	220	5	515
2013/14	10	260	160	10	440

Source: HESA Student Records (2015)

Table A7: Annual students fees for undergraduate programmes at a selection of Indian HEIs according to ownership.

Undergraduate programmes	Ownership	Programme	Duration	Approximate annual fee
IIT Delhi	Central institution	B.Tech	4 years	£1,200
University of Delhi (St Stephens)	Central institution	BSc (sciences)	3 years	£330
University of Lucknow	State university	BSc	3 years	£70
Amity University	Private university	B.Tech (various)	4 years	£2,000 to £3,000
MS Ramiah University of Applied Sciences	Private university	B.Tech (various)	4 years	£2,000

Source: Institution websites (accessed September 2015)

Table A8: Annual students fees for undergraduate programmes at a selection of Indian HEIs according to ownership.

Postgraduate programmes in business	Ownership	Programme	Duration	Approximate annual fee
IIT Madras	Central institution	MBA	2 years	£2,300
University of Delhi (Faculty of Management Studies)	Central institution	MBA	2 years	£1,000
IIM Ahmedabad	Central institution	PG Diploma (equivalent MBA)	2 years	£9,000
University of Lucknow	State University	MBA	2 years	£1,000
Manipal University	Private university	MBA	2 years	£3,000
Amity University	Private university	MBA	2 years	£5,200 to £8,000
ICFAI Business School Hyderabad	Private (non-affiliated)	MBA	2 years	£7,000
Whistling Woods, Mumbai	Private (affiliated)	MBA	2 years	£4,250
Calcutta Institute of Engineering and Management	Private (affiliated)	MBA	2 years	£2,000

Source: Institution websites (accessed September 2015)

Annex B: Case studies

Case Study 1: BA Fashion Design (UK partnership)

The programme and the partners

BA (Hons) Fashion Design offered through a 4-year programme and validated by the UK partner university. The Indian partner is a private provider with several other teaching centres across India. Additionally it has other non-degree international partnerships with specialist institutions, including regular summer schools.

Enrolments

2,000 students in total are enrolled at the institution and, of these, approximately 80% are following the UK validated TNE programme. There are a further 30 students enrolled on a one-year MA Fashion Marketing course that is also validated by the UK partner. Further an option for articulation for the BA students to the UK has been possible, but few now take-up, mainly because students wanted an internship as part of their time in the UK.

Delivery & compliance

All delivery is face to face by the Indian teaching staff although there are proposals to introduce part of the programme through distance learning. There are no affiliated Indian degrees on offer, and the programme is not formally recognised by any Indian authority. However as all students seek private sector employment, the Indian HEI does not perceive this as a problem.

Finance

The local fees for students on the BA

programme are approximately £3,500 pa, in addition students pay an annual £250 fee to the UK partner. This latter is remitted directly to the UK by each student. For the MA programme the annual payment to the UK university is £475.

Engagement with UK partner

Staff from the UK university visit regularly, a minimum of twice a year, prioritising the need to ensure UK QAA compliance. Video conferencing is also frequent. Over the initial period of the partnership a member of UK staff spent periods in India advising and assisting on the development of systems to meet QAA requirements.

Experiences of delivery

The partnership took about 2 years to develop from the initial discussions; the challenge was for the Indian staff to understand QAA requirements and the need for support systems. It was seen as complex and a fundamentally different approach.

It took time for both sides to understand the different cultures through which they operate, however as the relationship has matured a close and responsive partnership has grown. Staff development has been an important aspect with Indian staff, enrolling on the UK university's PG Certificate in Higher Education. The Indian managers were sufficiently impressed by the UK approach to develop their own PGC variant; all their staff in India now routinely follow the programme.

Additional comments

The Indian partner reported that UK partnership had led to improved

academic standards and had encouraged a greater professionalism amongst their staff.

The UK partner considered that the partnership had contributed to its broader international agenda and this has included increases in Indian student recruitment to the UK. Student exchanges were underway and several groups of UK students had spent time in India. Staff exchanges had provided access and understanding of the fashion industry in South Asia.

The programme was initially developed by academic staff at the UK university, resulting in much emphasis on teaching content, but less on management systems and finances. Tightening central management oversight in the UK had led to a critical appraisal of the partnership, the result being more robust QA systems in place and a renegotiation of the financial arrangements.

Case Study 2: BA (Hons) Hospitality Management & related (UK partnership)

The programme and the partners

BA (Hons) Hospitality Management with various options and of three years in duration. The partnership is with an Indian private provider who has other campuses and study centres. The Indian HEI has other degree and non-degree partnerships with universities in the UK and elsewhere.

Enrolments

150 students in total are enrolled on the programme ie an intake of about 50 students pa. There is an option for articulation to the UK and this proved popular when UK internships and work placements were allowed. It would seem that students had used their income for the 2-year work placement to offset the costs of study at the UK campus. The changes to the UK visa regime have resulted in no students taking up this option recently; previously approximately 40 students pa went to the UK.

Delivery & compliance

The UK provider validates the programme and all delivery is face to face by the Indian teaching staff. Currently there is no Indian recognition; it was suggested that the HEI would probably not meet some AICTE physical requirements e.g. land area. However it is likely that the HEI will affiliate with a local university for their degree.

Finance

The full fees for the BA programme are approximately £2,000 pa; from this sum the Indian partner pays the UK HEI an annual fee of £650 per student. Any student transferring to the UK for the final year would pay a reduced international student fee in the UK of £7,800.

This fee is comprehensive and the UK university covers all its costs from this sum – the only exception being the direct costs of an assessor visit each year. In addition the Indian partner needs to manage any foreign exchange fluctuations associated with the sterling remittance.

Engagement with UK partner

There is an excellent relationship between the UK and Indian staff, built up over the years of the partnership, the Indian side described this as 'exemplary'. The UK staff visit regularly, with about 3 visits to India each year, particularly for quality assurance and to assist in the assessment process. Over the initial period of the partnership visits were very frequent and with a strong emphasis on staff development.

Experiences of delivery

The partnership was not straightforward initially, the Indian team took time to understand the UK needs for QAA compliance and considered it onerous. Ultimately they developed systems and changed staff culture to the extent that they now see the UK approach as the 'gold standard' against which others are measured.

Staff development was important from the beginning and has been ongoing.

Contracting: the challenge for the Indian HEI has been managing foreign exchange, given that rupee fees are received from students and remittances to UK are at fixed in sterling (£). Approximately 30% of the total fee paid by students is remitted as the UK institution's share.

Case Study 3: BS & MS (Hons) in engineering (US university partnership)

The programme and the partners

This is an articulation arrangement between a relatively new Indian private provider and a US university. It involves a five year integrated degree programme leading to BS and MS degrees in four areas of engineering with both degrees being awarded by the US University. Additionally the Indian HEI is affiliated to an Indian university so that any student not transferring to the US, can obtain an Indian BTech degree. The Indian institution also has articulation arrangements with three other US universities, although these are inactive.

Enrolments

170 students in total are enrolled on the programme in the Indian HEI, and its AICTE approval allows for up to 360 students. The articulation arrangement has three options:

- First three years in India then two years at the US university for both B.S. & M.S. awards;
- First three years in India and then a fourth year at the US HEI for a B.S. degree;
- All four years at the Indian HEI with an Indian B.Tech degree awarded.

To date only eight students have transferred to the US University to complete the integrated B.S. and M.S. degrees. The advantage of this approach is that it can save one year

for the students – the total time to obtain a US M.S. degree is reduced from six to five years.

Delivery

The programme is delivered face to face by Indian staff. The individual courses, syllabus and assessments, were all developed to ensure compliance with the regulatory needs of both the affiliating Indian state technological university and the US university. The assessment regime is rigorous and only those achieving a sufficiently high ranking for each module are allowed to transfer to the US.

Regulatory compliance

The Indian HEI is accredited by AICTE, and approved to offer the programme in collaboration with the US university and the Indian state technological university. The US university is a well-established public institution.

Finance

Students pay a tuition fee of Rs1.6 lakh pa (£1,600) for the first three years, to the Indian HEI. On transfer to the US, the student fee is just over \$29,000 pa for the US university. Students are eligible for scholarships, based on school grades, additionally all are also eligible for a \$5,000 pa scholarship for study at the US university, dependent on academic performance.

There are no remittances from India to the US; no fees are paid to the US partner for the periods of study in India.

Engagement with US partner

The US university initially spent

time in India to assist in planning the programme. They visit routinely to monitor delivery and provide some teaching; additional support is available through regular video conferencing of lectures and seminars.

Experiences of delivery

This partnership was not straightforward and took around 3 years to finalise and launch the programme. There had been difficulties in meeting compliance requirements to satisfy the needs of the systems in both countries. In the initial period it had been difficult to attract students, but it is now improving following greater efforts to market.

Case Study 4: BA and MBA in film, media and related (previously a UK university partnership)

The programme and the partners

The Indian private HEI offers a number of BBA degrees and an MBA, all related to film, media and music. Previously there was an articulation/validation partnership with a UK university leading to a BA degree but this has now closed. There are however frequent student exchanges and project partnerships with universities in the UK and other countries.

Indian institution

The Indian HEI is a private sector provider with a single campus and was established in 2002. It is affiliated to two Indian universities for the

purpose of awarding the BBA and MBA degrees. It has no formal recognition through AICTE or other regulatory bodies.

Enrolments

There are approximately 750 students (potential capacity 950) enrolled on the programmes within the Indian HEI. Approximately 15% of its students are international (North America, Africa and European) as it has a strong track record for securing employment for its students in the media industry.

Foreign degree awards

The management of the Indian HEI decided only to award Indian degrees. Enrolment to the UK TNE partnership programme fell (UK visa uncertainties and high costs) and students found they could just as easily secure employment with their Indian qualification.

International partnerships

The Indian HEI has developed a network of global partners to encourage short-term student exchanges and cooperation on media projects. These relationships are wide ranging in North America, Europe and Australia. The Indian HEI still retains a close relationship with its previous UK degree partner and they visit each other regularly and exchange students.

UK universities visit the Indian HEI frequently to explore the possibility of some form of degree delivery partnership, but the fees students are willing to pay in India are well below that necessary for a foreign partner to cover costs.

Fees

The undergraduate fees are £2,000 pa (three year BBA course) and those for the MBA total £8,500 for the two-year programme.

Case Study 5: MBA (US university partnership)

The programme and the partners

The partnership is an articulation arrangement leading to an MBA award in the US university. The Indian HEI is a private provider and is well established (over 20 years old) offers a 2 year Post Graduate Diploma in Management (PGDM) and students have the option to transfer to the US university to complete the MBA degree. This arrangement allows for a dual award to be granted. The institution has twelve other international cooperation agreements, of which only two are currently active.

Enrolments

370 students are enrolled on the PGDM. The US partnership commenced in 2013 and approximately 50 students have transferred to the US to complete their MBA degree. Most Indian students, who are keen to follow the US MBA programme, and who obtain the necessary PGDM grades, can transfer to the US. When they complete the MBA they can remain in the US for a further year for an internship/work experience. Through this arrangement they are able to generate income to contribute to their university costs.

Delivery

The PGDM is full time and delivered face to face by the Indian faculty. The students need to obtain 18 credits during their PGDM to qualify for transferring to the US to study for the MBA. The MBA requires a further 21 credits.

Regulatory compliance

The Indian HEI programmes are approved by AICTE (since 1992) and the institution has NAAC accreditation (Grade B). The Indian partner is part of an Indian education group that includes schools and colleges in its portfolio (including with regular UG/PG programmes). It has affiliations for its programmes with a state university.

Finance

The local fee for students on the PGDM programme is approximately £3,000 pa for the 2-year period in India. The MBA fee for completing at the US University is approximately £8,300 for the remaining credits.

Engagement with US partner

The US partner spent approximately six months reviewing the Indian PGDM modules before recognising them as meeting their MBA requirements. Initially there were frequent visits by US university staff to support the Indian team and monitor delivery and quality assurance arrangements. The approach exempts the students from GMAT/GRE.

Experiences of delivery

It was initially a challenge for the Indian HEI to promote the collaborative programme. But using the MBA alumni to support promotion,

transfer to the US is generating strong interest amongst the current PGDM students. The Indian partner commented that the partnership experience had been beneficial, particularly the introduction to the US partner's approach to student assessment.

Case Study 6: BSc (Hons) Catering Science and Hotel Management (UK university partnership)

The programme and the partners

The Indian HEI is a private provider and is part of a large education group with several HEIs across India.

The TNE programme is for 3-years and in collaboration with a UK university. The partnership has been running for over ten years. Students have the option to transfer to the UK for the final year of the programme. This was previously very popular however, since the closure of post-study internship/work experience options, few students have chosen to transfer to the UK. However the Indian HEI also operates a small campus in Bangkok and students can transfer there and at a lower cost than UK.

The programme at the Indian HEI is also affiliated to an Indian university and students can thus obtain two separate degrees for the programme.

Enrolments

There are currently approximately 80 students following the validated programme, with an intake capacity of 100. Previously up to 120 students a year had transferred to the UK

for the final year. The programme is vocationally orientated and all students must undertake a 6 month internship/work placement as part of their assessment.

Delivery

The Indian HEI provides the premises, markets the programmes, teaches most of the programme, arranges placement and provides other support to teaching and learning. The staff from the UK university are also closely involved and visit frequently, typically, three times a year. They approve all acceptances for enrolment, run the student induction and initial week of the programme, teach a few courses, support staff training, jointly assess students and support quality assurance for the programme.

Student support

The Indian students have full access to the same VLE as fellow students in the UK; however as connections can be weak, all students are provided with full information on a back-up CD.

Staff development

There had been considerable involvement and with good experiences; teaching fellowships had been established and supported by training in India. The Indian staff had been encouraged to develop their own localised course modules for the degree programme. However higher than expected staff turnover had created difficulties.

Regulatory compliance

The Indian HEI and the partnership programme are not accredited by AICTE. However the Indian HEI is

affiliated to an Indian university for a BA award. The students are able also to sit for the Indian award, hence ending up with two separate degrees (BSc and BA).

Financial arrangements

The programme runs for three years and fees are £1,200 pa for the Indian HEI plus a direct payment by students of £950 to the UK university for validation of the final year of the programme. Any student transferring to the UK university is charged £7,000 pa fee. The UK university covers all its costs from student fees, no additional charges are levied. The Indian HEI provides additional support through the collection of the sterling (£) fee and then remitting to the UK as a consolidated amount.

Comments

Staff both in India and the UK commented on the successes of the programme. There was obviously a strong relationship between staff at both institutions, developed through regular visits and close teamwork. The comment made that a keen awareness and appreciation of each other's institutional and wider cultures had grown successfully. This had all contributed to a very positive approach to student support and assuring the quality of the student experience.

Case Study 7: B.S. degree in electronic engineering and airline management (previously a US university partnership)

The programme and the partners

The Indian HEI is a private provider, established in 1997, and is a top rated engineering colleges. Two B.S. degree programmes each of 4 years in duration in electronic engineering and airline management, were offered in collaboration with a US university. The Indian HEI had seven other international articulation arrangements mostly in the US but also UK and Australia – but all are inactive.

Enrolments

This US partnership programme commenced in 2007-08 but ended in 2012-13. During the six years of operation 429 students in total were enrolled in India, this against an AICTE approved intake of 120 students per annum (60 students per programme per year).

Initially there was excellent recruitment as it was reportedly a very attractive approach for students seeking employment in the aviation industry. Students were required to study a minimum of 1st year of the B.S. programme in India before having the option to complete to transfer to the US university for award of the US degree; transfers could take place in any subsequent year, thus resulting in 1+3, 2+2 and 3+1 options. Over the period of the programmes operation, 45 students transferred to the US.

There was also possibility to complete all 4 years within the Indian HEI, if any student does not want to transfer to the US university.

Delivery

The programme was face-to-face in India with US visiting faculty teaching a quarter of the modules. The Indian HEI provided web based instruction plus various audio visual aids and banks of other learning materials for students. They also had access to lectures, course material and laboratory training manuals to support their education needs.

Regulatory compliance

There was speedy approval by AICTE in 2007 for delivery of the US collaborative programme. The National Board of Accreditation also accredited the Indian institution. The programmes were also affiliated to a state technological university. The US university also had its engineering programmes accredited by the US Accreditation Board for Engineering and Technology. However, the AIU did not recognise the equivalence of the degree; meaning students were barred from accessing higher degrees or further professional training.

Finance

The Indian fee for the B.S. programme was Rs1.5 lakh pa; when in the US university the fee was \$25,000 per year. There was an interesting fee-sharing agreement that involved both Indian and US partners: 58% of the total fee collected from students in India was remitted to the US partner and 42% of total fee collected by the US partner was remitted to the Indian partner. Scholarships of up to

\$7,250 pa were awarded on merit. Through scholarship provision the total programme was an attractive proposition for students.

Engagement with US partner

The US university chose its Indian partner after a careful selection process and under the arrangement, the Indian HEI adopted the courses and curriculum from the US partner. The US university faculty were very active in the provision of training and also for guidance on teaching and assessment. Their programme involved continuous assessment.

Experiences of delivery

The MOU required about 8 months to agree and the programme commenced shortly afterwards. The Indian HEI initially found it challenging to meet all the requirements, formalities and also to comply with the various approval procedures. Understanding the US system, the approach to teaching and the syllabus needs was challenging.

A problem soon emerged as students had expected to be training with aircraft and they were disappointed to learn that the programme only involved laboratory activities and simulation.

After 2009, new private sector HEIs opened in the state; these competed hard and offered lower fees and scholarships for students, the net result being the programme's non-viability due to large enrolment decline.

Case Study 8: BEng, BA and MSc degree (UK university partnership)

The programme and the partners

The Indian HEI is owned by a leading private education group and was established in 2004. The Indian group also owns a private university with DAPs. The UK university partnership offers a suite of undergraduate and postgraduate degrees programmes in management, IT and engineering related topics and through both articulation and validation arrangements. Additionally there is a MSc Management of 1 year duration, completely delivered in India with the UK university awarding the final degree.

Enrolments

Approximately 2,500 students in total have been enrolled on the programmes within the Indian HEI with an annual intake of about 200 students for the UK programmes. The undergraduate programmes offer an option to complete the final year of study through transfer to the UK and about 20 a year have taken this route. Recently fewer students have opted to transfer, because of cost concerns and UK immigration constraints.

The duration of all undergraduate programmes is 3 years except for the integrated BEng-MEng, which is 4 years. For those transferring to the UK the programmes are 2+1 and 2+2 respectively.

Delivery and compliance

About a fifth of the undergraduate programmes are delivered by visiting

staff from the UK university. The proportion delivered by the UK staff increases to about 80% for the PG programme although with some additional distance learning support. Indian staff deliver the remaining parts of all programmes.

Currently there is no AICTE recognition although the HEI has now submitted an application. The programmes are also affiliated to a local state university for their degree award.

Finance

The annual fee for the undergraduate programmes is £3,900 with a separate fee of £700 pa for the UK partner. For the MSc programmes a fee of £3,500 is paid to the Indian HEI and the same amount to the UK university. For any transfers to the UK the normal international student fee is charged.

Engagement with UK partner

The UK staff visit India frequently to teach, support quality assurance needs and involvement in assessment. The staff at the Indian HEI have all been trained by the UK partner and have followed the UK university's academic practice development programmes; their training is enhanced through additional support when the UK university staff visit India.

Experiences of delivery

The initial period required significant input by the UK partner to support the development of QAA compliant monitoring and reporting systems. Staff development has been an important aspect of the partnership from the beginning. However its success has also resulted in relatively

high staff turnover due to 'poaching' by competitor HEIs.

Student enrolments had been declining over recent years but through close cooperation between both partners to support marketing and communications there are signs of growth again.

Other benefits

Some additional activities have developed, although not as much as initially anticipated. The UK partner sought the partnership to widen the UK university's experience of Indian higher education, grow research and businesses partnerships and encourage student exchanges. While there have been some research interest, this has been modest to date, but student exchanges are taking place, including through summer schools.





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